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ABSTRACT

This monograph is designed to enrich the database for persons seeking to learn more about viable approaches for facilitating career development in organizations. Suggestions are given for assisting individuals to chart their careers in the company and helping organizations to develop and utilize human resources more effectively. Several topics are dealt with in depth, such as career development strategies, career change, and executive assessment. The Career Development Diamond is introduced with its four component parts: career catalyzing, career exploration, career management, and career pathing. In another chapter, the significance of data gathering in the self-exploration process is stressed. A new perspective on the use of assessment centers for organizational or individual development is also presented. (JAC)

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CAREER DEVELOPMENT IN ORGANIZATIONS

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PREFACE

An ERIC computer search using the descriptor "career development" yields a plethora of resources and references. The diversity of topics, authors, and sources is striking. When one limits the search to career development strategies for organizations, however, the landscape changes from a lush pasture to a desolate plain--varying from scrawny, struggling articles to an occasional sturdy, imposing tome. This volume was written to enrich the data base for persons seeking to learn more about viable approaches for facilitating career development in organizations, i.e., assisting individuals to chart their careers in the company and helping organizations to develop and utilize human resources more effectively. A focused rifle shot at key targets (Career Development Strategies, Career Change, Executive Assessment) was chosen over a textbook, shotgun coverage. We preferred dealing in some depth with a few high priority, innovative ideas to skimming lightly over a broader range of topics and issues.

In the lead article Walz discusses an innovative and comprehensive design for career development, the Career Development Diamond, highlighting the importance and dynamic interrelationships of its four component parts: career catalyzing, career exploration, career management, and career pathing. The outcome of the simultaneous operation of the four components is a synergistic program that gives employees more than it asks of them.

Career change is viewed by Hill and Miller in the context of overall adult growth and development. To be helpful, the organization should attempt to distinguish between career changers who are striving to refine new interests and those who wish to consolidate and synthesize existing skills. The authors describe tools useful in working with career changers and emphasize the importance of top management embracing the mission of human development.

Fisher and Walz stress the significance of data gathering in the self-exploration process, discussing issues and describing the most commonly used data-gathering devices. Four major models of self-exploration are presented, followed by a case study of the implementation of one exemplary approach.

Assessment of executive talents is the focus of the Adams article. The author describes contemporary executive development efforts, both individually- and company-initiated. Each executive, he believes, has an Achilles' heel which, unless recognized and dealt with, can harm or even destroy the person.

In an interesting and informal change of pace, Gary discusses his approach to performance reviews. He presents basic principles of effective performance reviews as well as a mini-review by which individuals can gain new insights into their own approach to this critical facet of company operation.

Most management publications today contain discussions on Assessment Centers and how they can be useful in the selection process. A new perspective on their use for organizational or individual development and for career planning is presented by Gilbert and Jaffee. They describe the procedures used in establishing an Assessment Center and outline standards and guidelines for its operation.

The articles are thoughtful, fresh views of important career and human resources development issues. The authors toiled to provide a solid, conceptual base for their discussions as well as useful strategies for personal and program implementation. It is our hope that readers will be stimulated by the authors' thoughts and aided in their day-to-day work by the practical suggestions. The book is not intended either to provide all the information or to cover all the topics germane to career development. It represents only a beginning. But the beginning is frequently the most difficult.

Many persons are due appreciation for their assistance on this manuscript. Special thanks are in order to Lynette Kosky for her skillful typing, and to Libby Benjamin for her outstanding editing, which on occasion took the form of collaboration with the editor.

the career development diamond: touching all the bases

Garry R. Walz

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THE CAREER DEVELOPMENT DIAMOND:
TOUCHING ALL THE BASES

In this chapter readers are introduced to the Career Development Diamond, a graphic illustration of the four major components undergirding an effective and comprehensive career development program for organizations. Contrasting the characteristics of both ineffective and optimum career development programs, the author describes how use of this model can help management and the employee to achieve the greatest good for both the organization and the individual. Particular attention is given to the functions appropriate at each "base" of the diamond and to the interrelationships among and between all of its parts. The chapter concludes with a statement of five important outcomes that may be expected to occur as a result of using this approach to human resources management.

Introduction

What career development is and how it affects individuals may best be learned by hearing from those who have experienced it. Here are some quotations from real people:

> *The bottom line of all this career counseling business is that I end up having to attend to a hell of a lot of things that keep me from doing my real job!* (first-line supervisor)
>
> *As employees, we're encouraged to plan our career in this company, but the really important decisions as to who will do what are all made by management--secretly.* (young, disillusioned employee)
>
> *Window dressing, that's all this career development program is. How can we plan our careers when the people on top don't know what we'll be doing a year from now or who will do it. It's not only inoperable, it's a hoax!* (disgruntled, high-level employee)
>
> *This career program looks fine on paper, but it's too complicated and involved. So we just go on operating as usual--from crash to crash.* (top-level supervisor)

> *We strongly favor a career management program that promotes employee commitment and identification with the company. It is imperative, however, that the program not curtail management's prerogative to utilize employees where they are most needed.* (Vice President for Human Resources Development)
>
> *More than anything else that has happened here, the career development program has convinced me that the company cares about me as a person. And that's damn important.* (experienced middle manager)
>
> *The career program really helped me to see that I have a future with this company.* (new, young, ambitious employee)
>
> *All the affirmative action stuff this company has doesn't mean nearly as much to me as the fact that there is a program in place to help me plan my career here.* (minority female employee)

The above quotations came from conversations with individuals in several different organizations. They represent in capsule form diverse feelings of persons in different positions and/or persons who have experienced different types of career development programs. They illustrate vividly several "truths" about organizational career development programs: (a) The career development program is not a panacea--initially, at least, it may run into strong opposition; (b) How employees feel about a program may depend upon their position in the company; (c) A shortfall frequently occurs in translating the program from paper to reality; and (d) When optimally designed and implemented, a career development program can be a powerful stimulus to high morale and the effective utilization of employee skills.

Basic to the decision to implement a career development program is the need for management to commit itself to a systematic process of planning and implementation that will minimize the risks of failure. Organizations that attempt to short-cut the process pay the price of programs that are either generally ineffective or despite some excellent aspects have such serious deficiencies that the program withers away to extinction. The use of a systematic process, however, should never blunt initiative for moving forward. Caution and timidity are not going to get the job done. Some companies that have been "studying" their career development needs for 20 years are worse off now than when they began. Excitement and enthusiasm typically accompany the launching of a career development program. The organization should capitalize on this energy to full advantage but make sure that goals, desired outcomes, and implementation strategies are well thought out and understood. It's right to run--but it's essential to know where and why you are running.

The experience base for career development programs is relatively new and narrow. We have program experience, however, to be able to delineate which factors contribute to ineffective programs and which are associated with optimum programs. Examples of both are presented below:

Characteristics of Ineffective Career Development Programs

1. Spotty--the plan does not clearly designate who is covered or how.
2. The company and the individual proceed on separate tracks.
3. The implementors (managers and supervisors) are untrained and view the new responsibility as an intrusion or an added burden.
4. Employees lack the knowledge and skill required to make adequate career plans and decisions.
5. Employees are well into their careers in the company before planning begins.
6. High potential prospective employees (and others) are unaware of career options within the company.
7. Organizational career management operates without the knowledge or participation of employees.
8. The organization lacks adequate information for designing individual career paths.
9. Once made, plans or decisions are fixed.
10. The program lacks overall organization.

11. The program is too complex--outcomes are obscured by operational details.

12. Management and employees lack confidence in the program.

Characteristics of Optimum Career Development Systems

1. Regular interaction occurs between employees and management on career goals and plans.

2. There is planned, frequent updating of employee career paths.

3. The program includes comprehensive and valid assessment of employee career performance and potential.

4. Career paths include consideration of both organizational needs and individual desires and interests.

5. Potential career paths and their characteristics are discussed with employees at times of both recruitment and entry employment.

6. Each employee learns career and life planning skills: goal setting, decision-making, self-exploration and analysis, values determination, coping skills, managing change and transitions, stress and time management.

7. Career pathing and career counseling are provided by specially trained supervisors and managers.

8. An organized bank of career and technical resources is available for group and individual use to assist employees in achieving their career objectives (path goals).

9. The system is clearly understood and amenable to change.

10. A monitoring component generates data on (a) how well the system is operating technically, and (b) how management and the employees feel about it.

11. The system effectively forecasts manpower needs, assesses employee performance, and identifies unused employee potentials.

12. Participants have pride, ownership, and confidence in the system.

13. An in-house specialist knowledgeable about and skilled in career development provides leadership for the program.

Organizational career development programs have a spotty record. The quotations cited at the beginning of this chapter attest to the variability of employee reaction. Faddish responses to the newest "in thing" in human resources management have frequently resulted in more anguish than achievement. Even programs boasting of top management support and ample resources have fizzled like a wet firecracker--great expectations but no bang. The element crucial to a successful program is the existence of a comprehensive plan, with clear-cut objectives and a viable strategy for implementation. Such a plan, developed from the interests and needs of all parties in an organization, provides much needed direction and focus for the efforts of individuals at all levels. Without a comprehensive plan an organization may please some people but displease or even enrage others. For example, a narrowly-focused, management-oriented program viewed favorably by top-level staff can be considered total puppetry by employees: Management pulls the strings and everyone else jumps.

The basic premise of this author is that a career development program can be built on a "win/win" strategy. By responding to the important "turf prerogatives" and needs of different organizational constituencies, the program can be rewarding to all--organized management, individual employees, and those responsible for implementation. In the following pages a comprehensive plan for career development, called the Career Development Diamond, is presented. This approach is designed to address the broad array of interests and needs of organizational personnel and to do so in such a manner that it gives participants more than it asks of them.

Major Components Undergirding the Career Development Diamond

The Career Development Diamond (CDD) is a diagram of the components undergirding a career development program and the relationships among them. Understanding both the individual facets of the system and the way they interact is crucial to a knowledgeable interpretation of the career diamond approach to career development. The Career Development Diamond includes the following components:

Career Catalyzing. A career development philosophy should be an integral part of the recruitment and selection process.

Career Exploration. Individual employees should assume responsibility for self-assessment, for clarification of attractive personal options, and for tentative establishment of appropriate near- and middle-term career objectives.

Career Management. Management plays an essential role in the total career development program through both visible commitment and the quality of the attention it gives to development of needed program tools such as performance appraisal and job and needs analysis.

Career Pathing. A fusion of individual and organizational needs and interests should occur in the career planning stage involving both the individual and a responsible member of management.

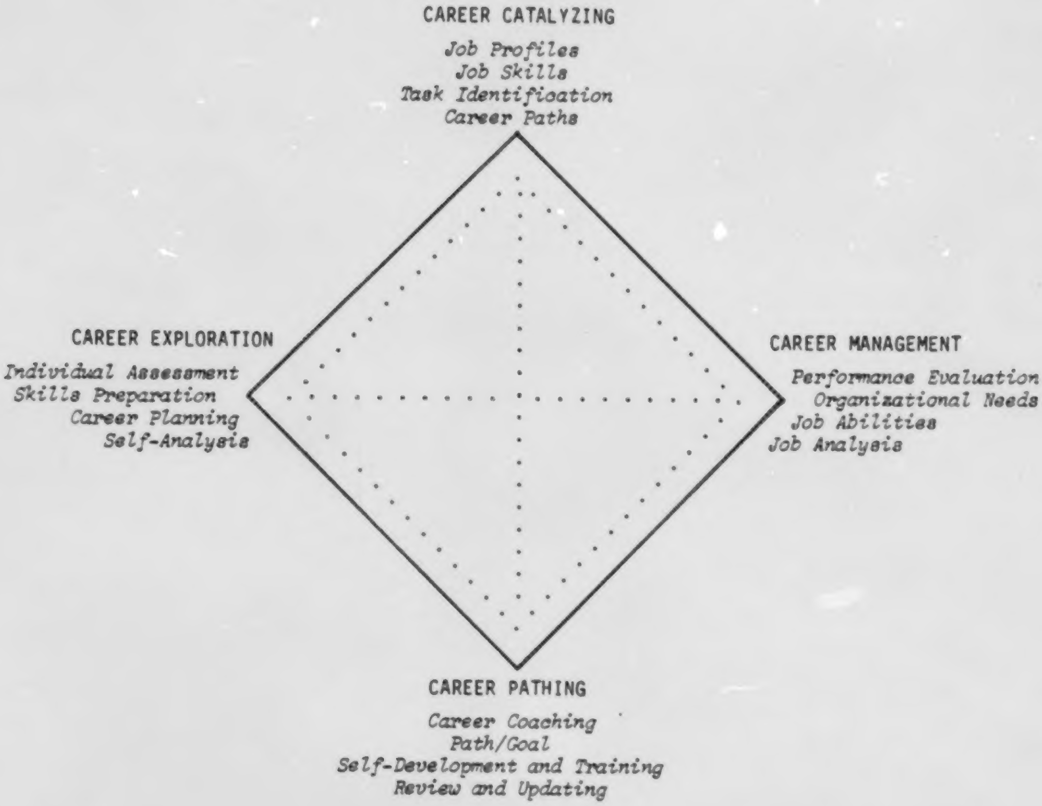
An adequately functioning career development program requires the presence of all four components pictured in the Career Development Diamond. This ensures not only the presence of a comprehensive program but also results in a synergism growing out of the interaction among the components which is of great benefit to both management and the individual. (See next page.)

Career Catalyzing

Career development is not an isolated concept to be applied only when considering the future of individual employees but is, in fact, a basic managerial orientation. This career development point of view should be expressed in the very beginning of the employment process in both the recruitment and selection of new employees. Inherent in this approach are several major ideas.

First, communicating to potential employees the career opportunities within the organization and the career paths individuals can follow to achieve different career objectives is an effective way of orienting them to the possibilities of their employment future with the organization. Time after time people express disillusionment or even anger at the lack of information given them at the time of their recruitment.

CAREER DEVELOPMENT DIAMOND


CAREER CATALYZING
Job Profiles
Job Skills
Task Identification
Career Paths
CAREER EXPLORATION
Individual Assessment
Skills Preparation
Career Planning
Self-Analysis
CAREER MANAGEMENT
Performance Evaluation
Organizational Needs
Job Abilities
Job Analysis
CAREER PATHING
Career Coaching
Path/Goal
Self-Development and Training
Review and Updating

Second, individuals who have the opportunity to review career opportunities with an organizational representative invariably are impressed by the attention the organization gives to their personal employment future. The very nature of the discussion about career opportunities and career paths leaves potential employees feeling that the organization is truly interested in them and concerned that they achieve their career goals. Third, this approach indicates to employees early on the importance of their taking initiative and responsibility for their own career planning. The company communicates its desire that an individual obtain the position which is most appropriate, but also makes clear that the person's efforts will determine, at least partially, how successful the process will be. Fourth, the career development approach minimizes feelings of frustration or dissatisfaction. The greatest turnover in many organizations often occurs during the early months of employment. This can be a time of floundering and uncertainty as individuals question what they are doing, why they are doing it, and what the future holds for them. If they have had the opportunity to do some thinking and planning regarding where they now are, where they wish to be, and the type of career path to follow to achieve their preferred goals--to see beyond the frustrations of the immediate situation--then temporary uncertainties have far less negative impact.

Our experience suggests that individuals emerge from an early career development focus with a feeling of excitement about the organization, a belief that the organization does care about them and their future, and a head start on conducting and managing their own career development. This approach clarifies from the earliest stages of a person's employment the fact that the organization and the individual must work together to realize the goals, needs, and potentialities of both.

Career Exploration

This area of the CDD points up the necessity for individuals to take initiative and responsibility for learning more about themselves and their opportunities within the organization. They should understand clearly the importance of their role in acquiring data about themselves and their situations. They also are responsible for analyzing the data that they generate and coming to tentative conclusions regarding its meaning and use.

Among the important aspects of this component of the CDD are the following:

Self-assessment activities. The organization should assist and encourage employees to identify important personal characteristics and learnings acquired through work and related experiences that will have meaning for their career plan. For this phase of the program a judicious intermix of different data sources should be available to them. Two types of self-data are particularly important. One is acquired from commercial, standardized interest, aptitude, or work performance tests that include norms relevant to business and industry. These assist people to make useful comparisons between themselves and others of comparable background and work experience. Good examples of such instruments are the *Strong-Campbell Interest Inventory* and the *Level I* and *Level III Life Styles Inventories* produced by Human Synergistics, Inc. These instruments are unparalleled in their ability to provide reliable data that can be used to make valid comparisons and judgments.

The second type of data is gathered from unstructured, self-report devices like checklists or true/false items of descriptive traits or characteristics. These "home-grown" devices are limited only by the imagination of the program developer and the capacity of the duplicating machine. Some of them have a substantive conceptual base; others are superficial and poorly thought-through. Self-report instruments have the advantages of touching on areas not ordinarily covered by more rigorous instruments, great simplicity in scoring, and low financial cost. Major disadvantages are their susceptibility to distortion by the user and a serious lack in both reliability (providing consistent results) and validity (measuring what they purport to measure). In general, people find these self-report measures interesting, even entertaining, to complete and feel good about them. Perhaps one of their great merits is that they encourage self-study and self-analysis. Test-takers frequently derive meaningful insights into their attitudes and behaviors or generate questions that prod them to seek further information. Caution should be observed, however, when drawing conclusions based on the results of the "scores" that they provide. Stimulation to further analysis and discussion, yes; substantive, definitive decisions or judgments, no.

One self-generated source of data qualitatively different from those just described is a career autobiography or a narrative essay about one's past, present, and future thoughts and feelings about career, educational, and leisure experiences. Such material provides a rich vein of information that can be extremely useful in helping to probe and analyze an individual's values, drives, and goals.

Data analysis and career planning skills. The second major emphasis within the career exploration component is on assisting individuals to acquire assessment and career planning skills. A mountain of data does not an effective career plan make! A consistent fallacy in many career planning programs is the belief that the greater the amount of test data the more the likelihood that good decisions or plans will result. This is just not so. Equally important to the acquisition of personal data is the analysis of the information, with considerable thought given to the implications of the data for the career plan. As a matter of principle, the ratio of perhaps two to three times more time devoted to testing than to analysis of test results should be reversed so that for each hour of testing, several hours are spent in the interpretation, analysis, and application of the test results.

A particularly effective way to do this is to train the test-takers themselves in basic principles of data analysis. Career planning seminars are highly useful vehicles for accomplishing this task. In the seminar individuals can be taught basic principles of measurement and, using their own test results as well as simulated case histories, can learn about appropriate and inappropriate interpretations and applications. The key emphasis in such career planning seminars is to identify major themes and trends present in the various sources of data. Themes or trends which run through objective measures and are supported by personal experiences on and off the job can furnish important insights regarding individual drives and needs that can help people make wise decisions regarding future directions. Career seminars also focus on building career planning and decision-making skills. Participants are introduced to a systematic decision-making model and acquire the information necessary to make relevant and timely decisions.

Another important aspect of the career seminar is promoting employee awareness of the career structure and the opportunities that exist within the organization. Typically, individuals have little or no knowledge of the possible range of career options or of job openings occurring now and in the near future. Understanding of the occupational structure and the various career paths available can be very helpful to individuals in charting their own developmental career plan.

The major intent of the career exploration component of the CDD, then, is for individuals to obtain information about themselves and about career opportunities and to make tentative choices regarding their future in the organization. At this stage individuals will be able to develop in greater detail, and to view with more perspective and meaning, plans initiated during the recruitment and entrance phase. An important source of useful information will be the organization's ongoing Human Resources Development program--e.g., feedback in performance reviews and discussions with the supervisor regarding the person's present and future work goals. More details on the use of this information and its relationship to career exploration are discussed in the career management component.

Career Management

This component describes the major responsibilities of management in the career development process. These functions occur concurrently and interactively with the other components of the CDD.

A major contribution of management to the career development process is the operation of an effective and comprehensive program of performance review. A performance review that emphasizes employee development and uses feedback on present performance to assist individuals to establish developmental goals and objectives has a natural and important relationship with the total program. As supervisor and subordinate review the subordinate's performance and success in achieving planned goals, a natural discussion ensues regarding appropriate future goals and their meaning to the person's career plan. Thus, while a performance review is an important tool for improving employee performance, it is an equally vital source of information and feedback to individuals in considering career options and making career plans. The performance review system developed by the author with Human Synergistics, Inc. for a Texas utility fuses the performance review into the career development process and stresses the review as a stimulus toward self-growth and development.

Management also has responsibility for conducting organizational needs analyses as well as doing job analysis and job abilities studies. Both of these activities provide data and projections regarding the organization's manpower needs and detail the specific abilities required to perform different occupations. This information can be extremely useful for individual career planning as well as for determining which particular career paths the organization should emphasize. Many organizational manpower studies provide inadequate information on the human skills needs of the organization and the specific abilities required in different career areas. This type of information is vital to adequate human resources planning and helps individuals in making decisions about appropriate career paths.

Career Pathing

The home plate of the Career Development Diamond is career pathing. It is at this point that a confluence occurs between the efforts of the individual and the organization. It is at this point that all of the data, ideas, and possibilities are translated into action plans and decisions which have a direct bearing on individuals' future development and career progression.

One of the most important functions of the entire career development process occurs during career coaching sessions. Career coaching is best performed by a supervisor or manager rather than by a career specialist from the HRD department. In the coaching process the two individuals reach mutually agreeable decisions and make a plan that incorporates both individual and organizational needs and goals. Utilizing all the data about the individual from the career exploration component and the information about the organization from the career management component and reviewing the initial goals and objectives established at the time of selection, the coach and the individual develop a career plan that represents their best thinking regarding the wisest career trajectory for the person. Ideally, the coach should be a human relations-oriented supervisor who has undergone specialized training in effective career coaching. A career development specialist from HRD or an external consultant can also serve as backup to the career coaching, available for discussions and planning sessions with both employees and supervisors. The career coaching role should be one that is deemed important by management and should be a part of each supervisor's performance review. If it is understood that career coaching is one of their key functions and that superior performance is rewarded, then after appropriate training, in the author's experience, supervisors can and do perform very effectively as career coaches.

The career path, simply stated, is a process by which employees and supervisors plan a career progression that takes into account present experience and skills and identifies what kind of additional self-development and training experiences individuals will need to prepare themselves adequately for future career goals. Built-in checkpoints regarding employee progress toward goal achievement help the employee and the coach to review the appropriateness of the career path and to make adjustments when necessary. Yearly review of the career path is a minimum essential for its effective operation. Changes in the career path are encouraged as the organization identifies new needs and goals and individuals acquire new personal insights. At its finest, career pathing is a dynamic process wherein employee and coach modify and shape the employee's clear-cut, detailed plan in ways that will lead to the desired employment future.

Component Interrelationships Within the Career Development Diamond

As can be seen by the dotted lines on the CDD (see page 9) between and among all components, information and communication flows in all directions. A few examples will illustrate how this interaction occurs. In the career catalyzing component prospective employees are introduced to the organization, their potentialities discussed, and tentative career paths reviewed. At the same time employees can ask questions, clarify what they consider to be meaningful rewards, and indicate what features make the organization attractive. Thus, the initial contact has important two-way dimensions. The organization learns what prospective employees are seeking in career opportunities and what facets of work are particularly important to them; the individual makes some judgments regarding the structure of the organization and its commitment to individual needs. Frequently, this career catalyzing component will be conducted by a career coach whose knowledge and experience in the career pathing phase can be very useful in comparing the employee's future prospects with the company to those of persons with similar backgrounds and interests. The career coach who has been involved in the career catalyzing process has a much better appreciation and understanding of the career aspirations of employees and the importance of relating initial career interests and goals to future career paths.

The horizontal flow is regular and continuous and involves acquainting employees with company goals and needs and informing the organization about the interests and aspirations of employees. This helps the company to develop appropriate training programs for various individuals, especially high potential, fast-track employees.

This continuous interaction among people in all four components of the CDD instills a strong commitment to the total process and promotes dynamic plans and decisions based on current and reliable sources of information. Ongoing interaction results also in a high degree of systemwide awareness of how the program is functioning which facilitates troubleshooting if and when problems occur. While formal monitoring of the program is essential, the operation itself fosters informal selfmonitoring that keeps all components of the system functioning smoothly.

Outcomes From the Use of the Career Development Diamond

As a comprehensive and interactive career development system, the CDD can lead to the following significant outcomes:

1. As a program which encourages, even demands, interaction among people and practices, the system is alive. It has verve and élan. Career coaches are themselves coached by others. Data used for management purposes are later reviewed as to their appropriateness for employees. People continually ask about and respond to different facets of the system so that its strengths and weaknesses are quickly revealed. Consistent monitoring ensures that the system will adapt and adjust to changing needs and interests. Hidebound, static, the system is not. Rather, because it incorporates the best thinking and ideas of its members, it continually renews its viability and effectiveness.

2. The clear message to the persons involved in the CDD is a commitment to their individual development. Both directly and indirectly, the company communicates interest and confidence in all persons which enhances their self-esteem and emboldens them to take on new challenges. They feel that the organization will encourage and support them in their quest to achieve their highest potential.

3. Because the four components are so closely tied in with one another, there is little opportunity for "blister" development--a bulge in one aspect of the program and a depression in another. The very interdependency of the system's components does not permit an excessive focus on one aspect. For example, if management places too great an emphasis on manpower development, persons involved in other components will quickly communicate their concern. This ensures a balance in priorities and the continuing presence of all essential functions.

4. The system stimulates individuals to "reach beyond their grasp," to glimpse the potentials possible if they acquire new skills, and to enhance themselves through work and self-development activities. This feature of the program appeals particularly to high potential, fast-track employees, but motivates all employees to take responsibility for their

futures and to realize that their own efforts will determine to a large degree what they carve out for themselves.

5. The comprehensive focus of the system encourages, indeed demands, systemwide program planning. The self-regulatory feature that prevents imbalance in components strongly underwrites the need for developing systemwide objectives and priorities and having available the resources that will insure proper functioning. Systemwide planning has the added advantage of involving relatively large numbers of people in responsible positions, giving it an identity and importance that heighten the personal meaning and significance for those who are experiencing it. Many career development systems falter because insufficient attention has been given to the overall implementation plan. The Career Development Diamond attends to the four basic elements of entry, individual initiative, organizational responsibility, and joint future planning which an effective career development system must have.

Touching All the Bases: A Home Run Strategy

Postmortems of unsuccessful career development programs frequently reveal the antagonism of some persons or the general disappointment of many. Invariably the original conceptualization was at fault. A manpower development program may have been given a few new twists, labeled "career development," and thrust on the organization with the sanguine notion that everyone would be elated with what management was doing. Or a self-managing career planning program which allowed everyone to pursue his/her own interests may have been introduced, resulting in management ire at the apparent "company be damned" attitude some employees display. Both of these examples illustrate the pitfalls inherent in extending a career development approach with limited goals and targeted to a single group to a multiple-goal project for a whole organization. However ardent the desire to make it work, such approaches inevitably fail. They fail because the program *doesn't touch all the bases!* The Career Development Diamond, because it responds to the major interests and needs of both management and individuals, succeeds because it does touch all the bases.

The Career Development Diamond is austere in the use of resources, rich in interactive benefits and organizational outcomes. The linking of individual interests with organizational needs results in a synergism that belies the scarcity of resources allocated to the program. And for the career development ballpark, the Career Development Diamond is a home run strategy!

career change: implications and suggested response strategies for the individual and the organization

Raymond E. Hill and Edwin L. Miller

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CAREER CHANGE:
IMPLICATIONS AND SUGGESTED RESPONSE STRATEGIES FOR THE INDIVIDUAL AND THE ORGANIZATION

The authors provide a way of thinking about career change which incorporates adult development and personal growth concepts. Career change and personal growth are viewed as a process of increasing differentiation of occupational and life interests followed by hierarchic integration. It is important for the organization to recognize whether the individual is seeking to refine new interests or consolidate and synthesize existing skills and interests through career change. Organizations are viewed as centers for human development in the sense that they provide learning opportunities for individuals. The organization is urged to take into account the changing career orientations of people over time, and to consider the problem of matching individual needs and organizational requirements as one of providing a plurality of job role options for the individual. Specific tools involve education of managers regarding career change concepts, work role adjustments, career counseling and planning, self-awareness workshops, specialized training and development, and outplacement. The authors caution that specific tools will not reach their full potential unless top management philosophically embraces the mission of human development as one of several organizational objectives.

Introduction

A person has to be able to change or he'll stagnate, but it is so hard to change in this organization. I'd like to move up or to pursue a related career, but I'm cast in the role of radiochemist and I don't know how to move out of it. I have to go outside of my work to get my rewards. (40-year-old engineer) (Dalton, Thompson, & Price, 1977, p. 19)

May the day come, perhaps very soon, when I'll bury myself in the woods of an ocean island to live on ecstasy, calmness and art. With a new family, and far from that European struggle for money. (Gaugin, 1890, age 35, in a letter to his wife one year before departing for Tahiti) (Chipp, 1968, p. 79)

> *This interest in student personnel work and college administration has always been there, even though it wasn't clearly apparent in the past. . . also, I am no longer concerned with lack of contact with successful female role models. Perhaps I enjoy being a role model. Also, I am finding myself at ease and enjoying the men I work with.* (39-year-old director of a college internship program and former home economics teacher a year after completing her MBA degree) (Hill, 1980, p. 19)

Whether it is dramatic, quiescent, or somewhere in between, career change is an important phenomenon now and will probably be more so in the future. Recent evidence suggests that it is becoming increasingly prevalent (and acceptable) for people to seek redefinition of their present occupational status, or development of new skills, job assignments, and life roles. Indeed, contemporary life course theorists characterize adulthood as a series of "structure building" periods followed by "structure changing" (transitional) periods in which attempts are made to work out the "flaws" of the prior stable period, or to redefine the life structure in ways more consonant with current developmental needs (Gold, 1978; Levinson et al., 1978). Career change is not easily effected, however, and usually leads to a variety of psychological dilemmas, unanticipated costs and stresses, and subtle motivational forces which render change problematic. In reflecting on the mid-career period, Sarason (1977) notes that the number of persons preferring career change far exceeds the number of those who actively seek and achieve it. He also calls into question the dominant cultural commitment to the "one life-one career imperative," a phrase which aptly symbolizes a basic psychosocial barrier for career changers.

The purpose of the present paper is to reflect briefly on career change in terms of salient theory and knowledge, but more important, to provide some images of how individuals and organizations can deal with the prospect of change so that the process fosters human development and personal growth.

The literature on career change is diverse, often contradictory, anecdotal as well as empirically-based, and proliferating at an almost frenetic pace. We will not pretend to capture all that has been written and said on the subject, but rather will focus on key concepts and ideas which we believe are fruitful in the quest to provide a developmental perspective on career redirection. Also, in order to make the discussion more manageable, we will focus on redirection in midlife, but will utilize the inclusive definition of midlife suggested by Pascal (1975), in terms of age: namely, the years from 30 to 55. By 30 years of age many people are at least toward the end of an initial exploration stage, and have likely begun serious attempts at establishment (see Super et al., 1957, p. 40). As Pascal notes, however, it is likely that people on the lower end of the definitional range account for a disproportionately high number of voluntary changes, whereas the upper end will contain relatively more persons experiencing involuntary changes. This definition is also broad enough to include the re-entry woman, whose life patterns are increasingly viewed in terms of career change phenomena. And lastly, it allows us to connect career change with some major ideas from the adult development literature which, as Van Maanen (1977) notes, is beginning to "come of age" after a long period of only modest interest from social science scholars.

Defining and Assessing the Magnitude of Career Change

An underdeveloped notion in the career redirection literature involves defining career change as well as its corollary, scaling the magnitude of change. There is a rather implicit, monolithic view of career change which says in effect that a person either changes careers or does not. We prefer to present a tentative framework developed by Hall (1980) which suggests a continuum describing different degrees of career change. The model is reproduced in Figure 1.

Generally, change becomes more complex as one moves upward from row 1 to row 14. (Incidentally, these numbers could be used by psychometric researchers as initial scale values in studies aimed at refining the framework.) Row 1 represents only a new job with no change of

Intensity of Change

Low ———————————————— High

		A Job	B Organization	C Institution Type	D Level	E Occupation/ Function	F Occupational Type
High	14.	New	New	New	New	New	New
	13.	New	New	New		New	New
	12.	New	New			New	New
	11.	New				New	New
	10.	New	New	New	New	New	
	9.	New	New	New		New	
Intensity of Change	8.	New	New			New	
	7.	New				New	
	6.	New	New	New	New		
	5.	New	New		New		
	4.	New			New		
	3.	New	New	New			
	2.	New	New				
Low	1.	New					

Compounding Factors

- Family change
- Life stage change
- Spouse career change
- Geographical change
- Other major life change

Figure 1. A Tentative Framework for Assessing the Magnitude of Career Redirection. (Adapted from Hall, D.T., "Midcareer Change: There's Less Than Meets the Eye." Paper presented at the Academy of Management, Atlanta, Georgia, 1979.)

organization, level, function, or occupational type, and hence is considered a rather modest change. The top row (14) represents a new job, organization, institution type, function, etc. Changes occurring toward the right side of the table are also considered greater than those occurring on the left. Row 11, for instance, which represents three changes (job, occupation/function, and occupational type) is considered greater than row 10 which represents five changes (everything except occupational field).

Changes in Columns A, B, and C, on the left side (job, organization, and institution type) involve primarily learning new norms, policies, informal power networks, and the like, but not new technical skills. Changes in the right hand columns (D, E, and F) are likely to require both skill and self-concept changes. Moving to a different level for instance (either a promotion or demotion) would probably involve the development of new technical abilities and responsibilities. Changing to a new function or occupation, e.g., from teaching to personnel work, would require the acquisition of new technical skills as well as a changed professional identity. And lastly, the greatest change would involve a new occupational type, column F. Within this last column, Holland's hexagonal model (1973, p. 23) representing the structure of the occupational world provides even further gradations of change, as illustrated in Figure 2.

Holland clusters occupations into six basic types, hypothesizing that each requires a different psychological orientation. The framework is therefore simultaneously a model of personality as well as a typology of occupations. The fundamental idea is that stability, productivity, and satisfaction result from a matching of personality and occupation type. The six basic orientations are briefly described in Table 1.

Holland's framework posits that neighboring types on the hexagon are most similar, whereas types across any diagonal are most dissimilar.

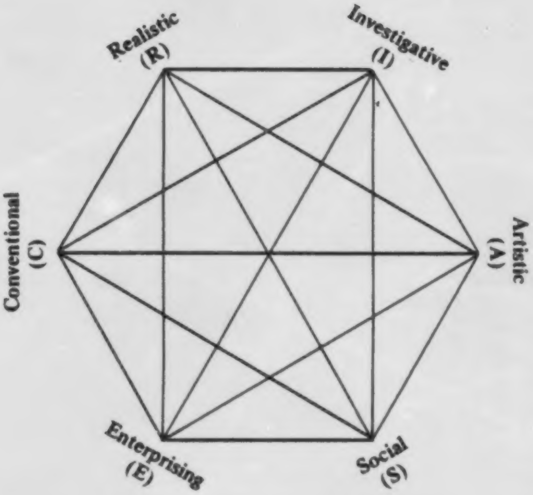
Realistic (R)
Investigative (I)
Conventional (C)
Artistic (A)
Enterprising (E)
Social (S)

Figure 2. Hexagonal Structure of Occupational Types. (Holland, 1973, p. 23.)

Thus, moving from one field to its neighbor (e.g., from Social to Enterprising) represents less change than moving from Investigative to Enterprising, which would involve maximal change in terms of new demands and the expression of new (or suppressed) parts of one's personality. Career shifts which skip one neighbor are of moderate magnitude. The framework also clarifies the distinction between occupation and occupational type which were represented as columns E and F in Figure 1. An individual who shifts from being an accountant to an investment banker, for instance,

Table I

Description of Holland's Personality and Occupational Typology

Personality group/ Occupational type	Sample interests	Sample personal traits	Sample characteristic occupations
Realistic	Precise use of objects – mechanical, electrical, animals, manual	Practical, conforming, thing-oriented, non-expressive	Technician, skilled trades; military officer
Investigative	Exploration and examination of physical, biological, cultural things	Rational, introverted, analytical, intellectual, likes to manipulate symbols	Scientific and analytical occupations; chemist, mathematician
Artistic	Use of various materials to create art forms – language, music, drama	Creative, expressive, non-conforming, independent in values	Music, art, literary occupations, architecture, photography
Social	Interaction with others to train, educate, cure	Friendly, outgoing, tactful, enjoys working with people	Teaching, social welfare, religious work, counseling
Enterprising	Interaction with others to attain organizational goals; leadership	Aggressive, ambitious, persuasive, enjoys influencing others, values power	Sales, administration, law
Conventional	Use of data; clerical, organizing, computational activities	Practical, efficient, orderly, responds to authority, enjoys large organizations	Accounting, secretarial, banking

Adapted from R.W. Beatty and C.E.Schneier, *Personnel Administration: An Experiential/Skill Building Approach.* Reading, PA: Addison-Wesley, 2nd ed., 1981.

has changed occupations but not occupational type, since both are clustered in the Conventional category.

Obviously, neither people nor occupations can be captured in all their complexities through a six-way classification scheme. Holland has thus extended his model to combination types such as Realistic-Investigative, Artistic-Social, or Conventional-Enterprising-Social. With six types, there would theoretically be 720 possible combinations. As Campbell (1977) notes, however, the use of the strongest one, two, or three themes is sufficient for most practical purposes.

While Holland's framework has often been associated with stability and finding one's "niche," it also has great (albeit under-utilized) potential for interpreting "turnover, adult career change, and the outcomes of midcareer crises" (Super & Hall, 1978, p. 367). Hall (1980) argues that what appears to be career change may actually be an attempt at restoring a person's sense of stability or balance. An individual starts a career with a particular set of aspirations, goals, and plans--in short, "the Dream," to use Levinson's (1978) term. However, getting into the occupational world often requires a series of adaptational modifications which nudge the individual away from his/her original position. In early career stages, the person may feel more need to comply with organizational socialization demands, or culturally prescribed roles related to sex and age, perhaps at the expense of his/her own sense of identity. As time goes on, however, a major developmental task involves becoming less role-bound, more of one's own person, more autonomous and self-directed. In Jungian terms, human development involves a process of individuation, particularly at midlife. Thus, "change" in careers may be seen as a move back to the original dream after a period of either being pulled or pushed away from it by the exigencies of adaptation to the external world. Incidentally, this "departure process" is often experienced in the short run as very satisfying. Many people are seduced by promotions, pay raises, exciting sounding work with high drama, and so forth. However, as time goes by, the reality sinks in that somehow they are no longer anchored in themselves. Paradoxically, at the same time this departure from the self is being externally fostered, there are internal, developmental pressures urging a reconciliation with the self. As Hall (1980) concludes:

> Thus what might look like change may actually be the gradual emergence and expression of the person's personality in the work environment. . . .The self may not be changing greatly. It is simply expressed more confidently. (p. 231)

In systems theory terms, this can be viewed as a homeostatic process which protects the individual's integrity. With reference to Holland's framework and occupational interests, the evidence is that people exhibit rather dramatic stability over time, particularly after age 22. Test-retest correlations over 20-year time spans have been as high as .70 (Hall, 1980).

Gottfredson's (1977) study of the 1970 census data also provides impressive empirical support for increased stability of occupational type with age (i.e., as age increased people moved less frequently from one of Holland's six categories to another). Holland and others (1981) note that "careers do have a lawful quality. Likewise, a person's aspirations from childhood to adulthood appear to have a similar regularity" (p. 290).

This focus on stability should not be taken to mean, however, that occupational personality is *static* and unchanging. Indeed, readers may begin to wonder why the authors are talking about stability when this article is supposed to be about change. Our point is this: that people have a stabilized form and quality about their personality, but that developmental changes occur within this form through the mechanism of *increased differentiation of its components over time.* Increasing differentiation is one of several principles of general systems theory, and it is our perspective that people and careers (and career change) should be viewed in systemic terms.

Robert White (1975) highlights several personal growth trends that are relevant to developmental career changes. These include:

1. Strengthening of ego identity. This is similar to the idea of increased differentiation, as well as the Jungian idea of individuation noted earlier.

2. Freeing of personal relationships. This involves becoming less role-bound, more of one's own person, again, more individuated. In Levinson's (1978) terms it involves progressing in managing the attachment/separateness polarity, and probably the masculine/feminine polarity.

3. Deepening of interest. Again we see parallels to the stability of occupational interests, as well as differentiation and individuation.

4. Humanizing of values. This involves (a) increasingly discovering the human meanings of one's own values in relation to the achievement of larger social purposes, and (b) integrating one's own experiences and motives into a personally wrought value system (as opposed to simply "buying into" the values of early authority figures with little personal questioning). Here we see again the notion of differentiation, with the addition of an important second idea in personal growth: *the integration of past experience into the personality.*

This leads us to our major premise about career change and human development. As Wolfe and Kolb (1979) point out, there is substantial agreement among life course theorists that growth takes place through a more or less continuous cycle of increasing differentiation followed by hierarchic integration, and that the highest levels of development are characterized by personal integration. This is also the general systems theory view of organismic development wherein differentiation is seen as a necessary precursor to integration. Personal growth through career change could then be viewed as either (a) exploration and expression of new and different interests in Holland's framework (differentiation), or (b) consolidation of multiple interests through the integrative potential which the change represents. Thus individuals and organizations should be encouraged to look at those parts of the personality which are seeking expression through the career change, a process in which Holland's formulations for interpreting personality can be most helpful. It is also very important for the parties to the change to understand whether the individual is striving for further differentiation and refinement of interests, or is looking for an integration and consolidation of different interests. This would also support the argument that personal growth capitalizes on the strengths of past occupational and life experiences--or, from a common-sense viewpoint, that people "lead from strength" in making changes.

As an illustration, consider the 39-year-old student personnel administrator, quoted in the beginning of the article, who discovered that her interest in college student personnel work had "always been there" (Hill, 1980). Her early career experience involved training and teaching in home economics at the secondary school level. (In Holland's framework, this would likely have been categorized as refining her Social interests--teaching related to home and family life; it also might have been viewed as Artistic, as Holland's classification of that work is Social-Artistic.)

As time went on another aspect of her interests sought expression. She became more concerned with teaching students "how to live effective lives" in a more general sense, and began delving into self-management, goal-setting, and financial planning--in short, activities expressing an Enterprising theme. At about the same time she stopped teaching to start her own family. However, family life with small children was not enough to satisfy this enterprising motive; so she differentiated it further through volunteer work with the local chapter of the American Association of University Women. She spent the next few years planfully developing her leadership skills and eventually became the chapter president.

With her children in school she then decided to pursue a Master's degree in business administration, in an effort to develop more fully her enterprising self. At the conclusion of her MBA studies, she was uncertain whether to take a job in a university or work for a profit-making institution. She eventually chose the university, and student personnel work in particular. She was Director of Student Placement, and as such, did some direct student counseling, but also was involved in administration. (Holland would classify this work as Enterprising-Social.) She enjoyed the entrepreneurial challenges in her work and future and expressed more interest in "moving up the ladder," in acquiring more responsibility and decision-making power. (From Holland's perspective, what we see happening here could be conceptualized as the sequential differentiation of her interests in the Social and Enterprising areas, followed by an integration and synthesis of the two in her most recent career experience as Director of Student Placement.) As a side note on the early origin of occupational interests, she described two kinds of childhood play: one at her paternal grandparents' home where she played in their "home office" as if she were a politician (Enterprising); the other at her maternal grandparents' home where she played homemaking in the kitchen (Social or Artistic).

One hypothesis is that early career change will more likely represent differentiation motives, whereas later career redirection will more probably involve integration. Theorists such as Jung, for example, highlight the process whereby individuals incorporate previously non-dominant psychological functions at midlife, suggesting that the last half of life in some sense balances the first half. Current scholars such as Bernice Neugarten (1977) and Marjorie Fiske Lowenthal and her colleagues (1975) have described how men at midlife move away from mastery toward affiliation, whereas women often exhibit the reverse pattern. And Levinson (1978) focuses on overcoming the four internal polarities of creation/destruction, masculine/feminine, young/old, and attachment/separateness. In Holland's framework, Conventional, Realistic, and Investigative areas might be considered to involve more mastery than affiliation, for instance. The Social category could be viewed as more directed toward affiliation, and perhaps the Enterprising and Artistic areas would involve a balance of the two.

In any event, organizations can do much to facilitate growth-oriented career redirection. Perhaps the global instrument for doing this is the creation of what Lotte Bailyn (1980) calls pluralistic career systems. It is to the specific practices which foster pluralism that we now turn.

Organizational Responses

Changing career orientations, unrealistic expectations concerning future career opportunities, and the spectre of professional and technical obsolescence are among the attitudes and feelings of uncertainty being experienced by midcareer employees. How have organizations attempted to cope with such attitudes and behaviors? In this section we will endeavor to identify and discuss some organizational practices and responses.

The Human Resource Management Philosophy

Today one can detect within many organizations an emerging model of personnel management which is different from previous personnel orientations. This model is concerned with processes and decisions affecting the use of an organization's human resources. It simultaneously bridges current concerns and future possibilities, and it is termed Human Resource Management (HRM) (Burack & Miller, 1979). The personnel department organized on the basis of a human resource management philosophy has moved far beyond the traditional activities limited to recruitment, selection, training, and compensation. Human resource management is responsible for activities and services needed by management for purposes of organizational planning and control, and the consequence is greater involvement in the direction and utilization of the organization's human resources. In its most sophisticated form, HRM attempts to influence organizations to become centers for human development.

The objective of HRM is to help an organization become more effective, and it seeks to achieve this by (a) being directly concerned with "bottom line" results for both the organization and its members, and this means a focus on employee needs and satisfaction and the linkage of individual performance to organizational performance; and (b) being cognizant that its responsibility and contribution to organizational effectiveness are vitally dependent upon its connection to institutional planning and in support of ongoing personnel practices involving administration and control.

Planning for human resource needs is more than a set of techniques or a system that is part of human resource management. It is the *way* that management and the personnel function comes to grips with sometimes ill-defined and complex human resource problems. One manifestation of this has been management's increased concern for the career needs of its employees. Career management and its emphasis upon career planning and development have become important organizational tools for responding to employee career needs and aspirations.

Retention, development, and utilization of talent become important organizational imperatives. This means giving greater attention to such activities as managerial awareness of career needs, career counseling, individual career planning, and creative and innovative training and development programs. The challenge facing the organization is to develop the talents of its work force and to match them with opportunities that best fit the individual's and the organization's needs. It is apparent that many managements are becoming increasingly concerned with not only the quantity but the quality of the talent employed, and the means to achieving this goal is through planning.

Challenges to the Manager

The manager plays an important role in dealing with employees who are experiencing changing career orientations. The immediate supervisor represents the first line of organizational response to the employee, because it is his/her responsibility to recognize and interpret employee career orientations and to integrate these orientations with organizational responses. Organizations have developed positive programs for preparing their managerial personnel to identify various career orientations of employees who are in midcareer, and to scan a wide array of managerial actions which can be taken to generate incentives and rewards congruent with the individual's career needs and organizational reality.

Bailyn (1980), in a fecund study of midcareer issues in technology-based careers, found that people possessed varied orientations toward their work, even when their educational preparations were similar. One group of employees may be oriented toward the technical aspects of their work. Another may lean toward the human, managerial aspects of their assignments. A third group may have major concerns quite apart from work, being interested more in community, family, and noncareer or nonwork kinds of activities. As a caveat, one must not equate differences in career orientation with overall abilities and organizational effectiveness.

Organizations which have included career management topics in their management development and training programs have found Bailyn's work to be valuable. One of the themes stressed in sessions on career management is that each combination of ability and career orientation can contribute in different ways to the organization, and it is the manager's responsibility to determine how to respond most effectively to the employee.

What are some of the job options a manager may want to consider when confronted by employees with different career orientations and varied evaluations of organizational effectiveness? Bailyn argues that managers must become aware of the potential range of assignments. In Figure 3 she presents examples of various roles which capitalize on career orientation and judged organization effectiveness.

Leadership style--democratic or authoritarian--is a commonplace topic in management development seminars, and managers are aware of the

Orientation at Mid-Career	High (+)	Low ("ordinary") (-)
Technical (T)	T+ Independent contributor "Idea innovator" "Internal entrepreneur"	T- Technical support Expertise on "formatted" tasks "Master"
Human (H)	H+ Top manager Sponsor "Successful" manager	H- Mentor Individual development functions "Coach"
Non-Work (NW)	NW+ Specialist Internal consultant "Variance sensor" "Scanner"	NW- Routine tasks Reduced time commitment

Figure 3. Organizational evaluation of effectiveness according to midcareer organizational roles. (Bailyn, 1980.)

potential applications and advantages of each style. What about a contingency or situational approach to job assignment based upon an employee's career orientation and level of job performance? Organizations are reexamining the conventional wisdom approach to job assignment and are beginning to consider a variety of approaches to this problem. The manager plays an important role in the job assignment process.

Bailyn's work has provided the foundation for preparing managers to incorporate an employee's career orientation and level of performance into the job assignment decision. The end result has been an increase in organizational effectiveness and employee satisfaction.

Table 2 provides the reader with examples of job roles and the challenges that a manager may face when making assignments for a person located in each cell of the matrix.

The merits of this approach have been to sensitize managers to (a) different career orientations, (b) recognition of the fact that an employee's career orientation may change through time, and (c) the need to devise management strategies to capitalize upon these varied career orientations.

Career Planning and Counseling Programs

Organizations are rapidly expanding career counseling services for employees considering career changes. The emergence of the HRM model and its incorporation by organizations have stimulated management to consider the value of career counseling and its impact on organization effectiveness and individual career objectives.

Educational institutions and consultants involved in management education provide formal programs designed to assist organizations to develop their own career planning and counseling activities. These seminars expose participants to the design and components of effective career counseling programs as well as to counseling techniques and tools considered to be valuable for both counselor and counselee. Because of the combination of such forces as the HRM philosophy, the bandwagon effect of imitating other organizations, and the pressures of affirmative action and equal employment opportunities, laws and programs, these courses on career planning are very popular.

What components and techniques do organizations use to assist employees experiencing changing career orientations or considering a career change? *The basis of any effective organizational career counseling program is the demonstrated interest by management in its employee*

Table 2. Examples of Job Roles

Cell T+	This cell represents technically proficient individuals whom the organization considers to be high performers. The challenge for the organization and its management is to capitalize on these individuals' technical orientation and willingness to contribute their abilities to the organization's objectives.
Cell T-	This cell consists of those technically-oriented employees who are evaluated as average or somewhat obsolete in their technical abilities. With an individual of this calibre, the challenge for the manager becomes essentially one of preventing the employee from losing interest in his/her work. Underutilization of these employees may create a group of disaffected employees where none may have existed.
Cell H+	This cell includes employees who have demonstrated desirable managerial qualities and highly developed interpersonal skills. Employees who combine a human orientation with successful job performance are the future executives of the organization. The challenge for the manager is to evaluate the middle-level manager on the basis of performance rather than fall prey to using a stereotyped set of qualifications of management several levels higher in the organizational hierarchy.
Cell H-	In this cell are employees judged to have reached the pinnacle of their managerial career. They are considered to have "peaked out," and the challenge for the manager is to devise job assignments which capitalize on the peaked-out person's expertise.
Cell NW+	Employees included in this cell represent an organization's major lost human resources. Such employees either have lost their work orientation or perhaps have never had a high work motivation. High potential technical and human-oriented employees who are capable of major managerial or technical contributions comprise this group. The task for the manager becomes that of recognizing the individual's priorities and undertaking innovative arrangements between the organization and the employee to tap the individual's potential.
Cell NW-	This cell consists of average employees considered not to be oriented toward work. This nonorientation toward work occurs either because of previous adverse organizational and work experience or because of basic values and commitment. The manager will be expected to deal with these employees on an individual basis. Generalized inspirational speeches intended to remotivate organization commitment are likely to lead nowhere.

concerns and the willingness of employees to take advantage of the organization's career counseling program. Having a career counseling program and the most advanced counseling tools available is not enough. Employees must perceive management as interested in their career problems and willing and able to guide them through what may be a traumatic period in their careers. Trite as this suggestion may seem, organizations have not historically assumed much career responsibility for anyone except high potential employees.

Organizations are training and assigning people to career counseling positions, and these individuals make up a majority of the participants in career planning and counseling seminars. Organizations are providing their employees with tools for individual career planning, including workbooks, career workshops, personality tests, and interest inventories and career information. Many organizations have made giant strides in collecting and developing materials that can be used by employees regardless of their particular organizational level or function. These procedures focus upon self-analysis and personal career development.

The individual who uses the services of an organization's career counseling service is apt to obtain information on his/her personal goals, interests, values, capabilities, and limitations relative to career options. This information becomes the basis for substantive discussions between the employee and the career counselor and perhaps the individual's immediate supervisor. The consequence of this type of interview is the development of a personal career plan.

Organizations are coming to understand the implications of career management activities and their impact on employee behavior and attitudes. The manager, as a representative of the organization, plays a critical career management role because of his/her continuing relationship with subordinates. For some employees, career concerns may be continuing and intense, sometimes even disruptive. Such individuals may require a long-term commitment from their managers, and the organization must be prepared to fulfill this responsibility. For whatever reasons, other employees may be reluctant to approach their managers or career counseling personnel for the purpose of discussing career options. In this situation, management's role is minimal; however, certain organizations have taken a variety of steps. Some advertise their career counseling programs through employee publications or cooperate with associations or unions representing the organization's employees. Some of these groups have initiated career counseling programs for their membership. However, the most important vehicle is the performance appraisal interview and management's desire to assist employees with their career concerns. The manager and the organization must be prepared to meet the employee's needs whenever it is necessary and possible. This organizational response is occurring. For those organizations espousing and implementing a human resource management philosophy, career management has come to be interpreted as a continuing rather than an *ad hoc* relationship with employees.

Training and Development

Organizations are expanding their resources in support of individual career needs. Professional and technical obsolescence is a significant concern of the midcareer employee, and it is an issue that organizations are doing something about. For example, some organizations sponsor tuition refund programs as a way of meeting the individual's professional or managerial needs. In a similar vein, other organizations establish "in house" seminars on functional and technical topics of importance to the midcareer employee's performance and career. These seminars are limited to midcareer employees who thus have an opportunity to learn new skills in a nonthreatening environment.

From a different perspective, organizations are identifying new and different professional or management assignments to meet the individual's career orientation. Career pathing procedures are already in place in many organizations and for the employee experiencing stress or uncertainty in career, the use of career pathing has proven to be quite valuable (Gould, 1978).

A career pathing program combines the employee's career objectives, educational preparation and work experience to enlarge upon the individual's capabilities. The career path is a set of related jobs designed to lead to a more responsible position, and the attempt is to motivate employee achievement and performance. Career pathing programs should provide a highly motivating experience for the employee as he/she realizes that they should lead to a highly valued goal. Organizations try to do their best, but management must be realistic; there are times when the organization can no longer provide work assignments or rewards that the employee wants.

Outplacement

Another type of activity offered by some organizations for their employees is outplacement. In certain circumstances organizations provide professional services to assist those employees whose career needs are no longer congruent with the organization's human resource needs. Typically, organizations limit outplacement assistance to employees at the managerial level. The outplacement support can be as simple as helping employees prepare resumes or as extensive as assistance in a full-scale job search.

Summary

Earlier in this paper we have attempted to suggest a way of thinking about the individual psychological processes underlying career change, and in the latter part to focus on how organizations can become agents of individual change through a plurality of mechanisms. The most powerful of these mechanisms is the immediate job assignment itself which is ideally worked out through collaborative discussions between employee and supervisor.

Bailyn's framework of differing midcareer work orientations among technical, human, and non-work provides a pragmatic statement to the organization, yet it is conceptually linked to earlier comments regarding individual changes in differentiation, and development of re-emergent or new self-components and interests. It is the collaborative discussions between employee and employer which allow for the exploration of new orientations and adjustments in the individual's work role. And this in turn leads to the expression of new interests, or consolidation of multiple interests.

Other strategies such as career counseling, career pathing, training and development, and outplacement are important supportive processes, but do not have the same power to effect change that adjustments in work role provide. Nevertheless, if organizations are to communicate to employees an interest in career development and change, they must genuinely support and implement all of these programs.

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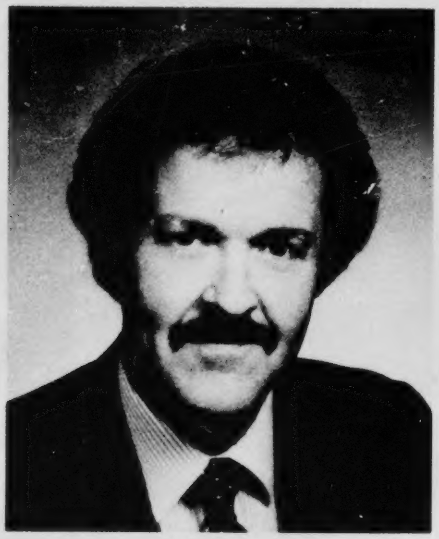
self-exploration in career development

D. Joseph Fisher and Garry R. Walz



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SELF-EXPLORATION IN CAREER DEVELOPMENT

Because self-exploration and self-understanding are so critical to effective life planning, myriad ways of gathering data about self have been devised. In this chapter the authors discuss issues important in data gathering and describe the kinds of instruments commonly used in the process. Four major types of self-exploration models are presented with a brief discussion of the strengths and limitations in each. Having worked together to install one approach to self-exploration in a large utility company, the authors present a case study of its implementation as an example of how such a program works. The chapter ends with a list of conclusions and recommendations for program planners to consider as they design strategies for use in their own work settings.

Introduction

Bookstores today contain stacks of hardcover books and paperbacks devoted to self-growth. This self-help literature assists people to acquire knowledge and develop skills in high social need or interest areas ranging all the way from how to manage your own divorce or bankruptcy to more psychologically-tuned books on how to enhance your interpersonal relationships, negotiate business deals, or become a millionaire. Implicit in these books is the idea that with some basic knowledge and a detailed procedure to follow, almost anyone can become an expert and reap major benefits as a result. Implied as well is the notion that professional helping persons serve only to complicate the whole situation.

An active target in the self-help movement is career planning. And crucial to effective career planning is self-exploration, which helps individuals acquire the information they need to make wise career decisions.

Undoubtedly, individuals can and do profit from a self-discovery approach to career planning. After all, as one person remarked, "It's my life at stake here!" In an organizational concept, however, individuals must take into consideration the impact of the organization on their planning and decision-making. In undertaking a self-study they need to know what questions to ask, where to find needed information, whom to consult for assistance, what areas of exploration are especially crucial. In this chapter the authors identify some different models of self-discovery and discuss their strengths and limitations. This review should aid individual career planners and career planning program organizers to determine which model will be most feasible for them or to combine various self-discovery approaches, building upon the strengths in a number of models.

The authors recently saw a cartoon picturing a drowning man with his hands in the air yelling "Self help! Self help!" It is imperative in our learning about self to know when to say "Self help!" and when to say just "Help!" Hopefully, this chapter will assist readers in making that distinction.

Data Gathering

Career planning approaches vary a great deal in the extent to which they emphasize data gathering. The question is not whether data should be used--theorists and practitioners all agree on its importance. Rather, the question concerns what type of data is relevant and how it should be collected. Therefore, it is important to consider some of the major issues relating to data gathering as a function of the self-exploration process.

Degree of Internal Control Over the Data Gathering Process

The role of the individual in gathering data about self varies considerably. In some programs individuals act solely as respondents, following explicit instructions with little or no understanding as to what they are doing or why. Used frequently in commercially-developed psychological measures, this approach is based on the assumption that prior knowledge of the intent or use of the instruments may skew the results or bias the respondent. Individuals are therefore literally "kept in the dark" until they are presented with the scores. In other approaches, people are given only broad guidelines or asked probing questions which require them to seek answers by introspection and reflection. The introspective method places a premium upon the individual's ability to review present and past behaviors and experiences and, from these, to draw valid conclusions and generalizations.

Test Results Reporting *vs.* Self-Assessment

Traditional methods of self-exploration emphasize tests and the reporting of test results to the individual. Standardized, well-normed instruments with extensive statistical back-up information are most commonly used. This approach places greater emphasis on the acquisition and reporting of data than on their interpretation and appropriate application.

A more recent development is self-assessment, a method in which individuals attempt to extract trends and themes from the different types of information that have been collected. Single, isolated scores are given much less credence than broad trends revealed in more than one set of data. The self-assessment method emphasizes drawing inferences and developing significant generalizations rather than concentrating on detailed specifics about an individual. For example, how does this person respond to stress? What is the individual's attitude toward change and risk taking? With what skill does the person confront barriers? How does he or she typically cope with new situations? Such global questions reveal important characteristics about people and how they operate in a variety of life situations. The self-assessment approach lends itself particularly well to developing better understanding of individuals' lifestyles and the way they make life decisions and plans.

Present *vs.* Development-Over-Time Perspective

One of the major distinctions among self-exploration devices is the amount of attention they devote to measuring what a person is like at a given point in time *vs.* over a period of time. Many test batteries provide a fairly comprehensive view of a person's characteristics and ways of functioning at the time of testing. The longitudinal approach considers the influence of the past on the present, providing insight not only into the interests and activities that have led to a current level of functioning but also into potential future directions for development. Data from both methods contribute to self-understanding. The ideal, of course, is to combine the intensity of a cross-sectional, current assessment with the extensive data gathering of the longitudinal approach and its potential for revealing life themes and developmental trends. Information on themes and trends is particularly useful to people in making predictions about their probable growth and development and then incorporating these projections into a career plan.

Description *vs.* Action Planning

Self-assessment methods differ in the extent to which they focus on mere description as contrasted with facilitating initiative to set goals and implement plans. Individuals develop action plans from clearly-stated goals and objectives. The assessment provides the information relevant to and necessary for determining the goals and objectives. Historically, scores and other test results either have led to reinforcement of the status-quo or have been used by decision-makers to make judgments regarding a person's suitability for a particular occupation or task. The potential fallacy in self-assessment methods which emphasize reporting of data is that acquisition of self-information is not likely either to alter an individual's perception of him or herself or to motivate the person to change. Unless the objectives for collecting the data are well-defined, it is very likely that large quantities of information will be amassed. But the very quantity may become an obstacle in the use of the data for behavioral change and enhancement. The real purpose of assessment is to acquire information pertinent to important goals so that, equipped with that information, individuals can make wise decisions and action plans.

Types of Data-Gathering Devices for Self-Exploration

There are many different devices for acquiring information useful in self-exploration. In practice, individuals may use a single method or a combination of several. Some of the major approaches are listed below.

Norm-Referenced Tests

Standardized tests and inventories compare individual results with a previously established norm group(s). Many aptitude, achievement, and interest tests are norm-referenced, contrasting individual scores with those achieved by members of a well-defined category, e.g., college graduates, first-line supervisors, managers of HRD. One advantage in such instruments is that individuals can compare their results with several different norm groups. Norm-referenced tests typically "improve with age," i.e., older instruments have more extensive norming than newer ones; hence the ability to make meaningful comparisons is enhanced. The disadvantage in this type of instrument is the lack of measures of absolute performance, i.e., a person may score well in comparison with a particular norm group but still not be able to perform effectively.

Criterion-Referenced Tests

Criterion-referenced instruments measure performance. They determine the extent to which an individual can carry out important functions or tasks. Without attempting comparisons, scores indicate how well an individual can perform a task, or the percentage of a given number of tasks the person is able to perform. Criterion-referenced measures are particularly useful in determining whether a person has the requisite skill or knowledge to accomplish a specific task or take on new responsibilities.

Autobiographies

Individuals often gain important self-knowledge from writing an extensive autobiography that lists the major events in their lives and the ways they have dealt with these experiences. Analysis of the autobiography can provide rich insights regarding habitual coping patterns as well as latent skills or talents. The very reading of an autobiography can be extremely illuminating for the reader--particularly if the reader was the writer. Autobiographies are especially useful in helping individuals ferret out trends and themes in their development and behavior.

Assessment Centers

A new source of data-gathering about self is the assessment center where individuals perform tasks and activities associated either with jobs and occupations in general or with specific occupational tasks such as supervision or sales. The most noteworthy characteristic of the assessment center approach is that participants complete tasks which are very like those that must be performed in a particular job. Perhaps more than any other device, the assessment center approach allows people to make judgments about how well they could perform in a given occupation prior to their actually engaging in it.

Interest Measures

Interest and values measures are useful self-assessment procedures in that they indicate the degree to which an individual would gain satisfaction from pursuing certain avenues of work and/or lifestyle. They predict not only potential satisfaction but also occupational stability. Measures of values reveal the basic orientations of an individual and suggest what it is they should design into a lifestyle to make it personally rewarding. Measurement of interests and values lacks the precision of other types of assessment, but these areas are nonetheless important and powerful influences on individual behavior.

Stimulus Questions

Stimulus questions cause individuals to search within themselves for answers in terms of feelings and past behavior. Based on their own introspective and subjective opinion, people adjudge the extent to which they have performed some task or activity. Such questions are easy to administer but often complex and difficult to interpret.

Self-exploration methods need not be mutually exclusive. The most desirable approach to self-exploration is to combine and integrate the features of different approaches that are most suitable for a particular purpose. Suitability is determined not so much by the inherent desirability of a given instrument as by its applicability to certain needs and conditions.

Self-Exploration Models

If one subscribes to the idea that self-exploration is important and can make a meaningful difference in career development, then choosing from among a number of options and alternatives becomes the logical next step. Although many models are described, advertised, and available, there are four basic approaches which essentially "cover the waterfront."

1. Self-Initiated and Individually Sponsored Approaches

Any bookstore will sell you dozens. College placement offices have a myriad of interesting guidance and self-help materials. Adult education classes, junior college, and special schools' courses are available. Many universities have special assistance for women, minorities, and "the disadvantaged."

Many of these courses, books, and programs are excellent; some are worse than no good since they may cause people to make important career and life decisions on either sketchy or erroneous information. Unless one already knows quite a bit about career development and perhaps more importantly about one's self, it is easy to be taken in by promises or easy-to-read manuals which may gloss over issues and steps that may be crucial to a successful and effective self-help process.

2. Company-Sponsored Executive/Management Assessment

(The RHR Approach) The firm of Rohrer, Hibler and Replogle was established several years ago to help managers and executives in organizations evaluate their strengths and limitations and to offer professional recommendations for self-improvement, job changes, or possibly promotion.

A professionally trained psychologist, usually a Ph.D., handles the evaluation which includes both paper and pencil tests and interviews and culminates in a written report.

Large corporations often call on RHR for evaluations of high potential managers who are being considered for promotion. In these cases, the individual being assessed is usually given some feedback on the results of the process, often verbally only, while the company executives receive a written report making specific recommendations for or against advancement. There is ordinarily no ethical problem with this approach so long as the individual agrees to having the results used as described.

There are pros and cons to this approach as there are to any. The advantages are self-knowledge, new insights, possible self-development goals, or even a promotion. The disadvantages are that the control is in the hands of the sponsoring agent and the data will likely remain in a personnel file for an indefinite period. Future reference to a current poor performance could be inhibiting to further career advancement opportunities.

3. Company-Sponsored Individual Assessment and Self-Exploration

Currently in vogue in many companies are management/career development programs designed and conducted by internal Human Resources Development staff or by outside consultants. Data generated are usually allowed to remain confidential with the participant and may never be disclosed to company management except on a voluntary basis. Such a posture seems to encourage openness, honesty and a desire to "learn all I can about myself" on the part of participants. The company's image of a caring concerned "parent figure" may be enhanced and many individuals will choose to share information about themselves with their supervisors as a result. The company benefits in two ways: first, through a more growth-, improvement-oriented individual who will likely perform more effectively as a result of the process; second, through more open and direct communication as a consequence of a higher level of employee trust in the company's attitude.

4. Company Data-Gathering for Purposes of Selection, Development, and Promotion

In this category is a whole range of tools, systems, or programs which are only marginally effective, if at all--performance appraisals or performance development and review programs, as they are sometimes called; pre-entry test batteries; interviews; career planning inventories; attitude surveys; and so forth. Some companies offer their employees optional developmental opportunities such as college courses, special purpose internal classes or perhaps "quick response" courses based on employee group requests.

Here, again, there are pros and cons. If an individual aggressively pursues all available options, much can be gained. Too many times, however, months of waiting may be necessary to get into a program, and in other instances individuals may never really know how they are doing or what results were achieved through their efforts, since the data are collected in a central filing system and may not be open for inspection.

The real issue in this more amorphous, smorgasbord approach is that the emphasis is more on company-wide issues and not primarily geared for individual growth and development.

An Optimum Career Development Approach

Key Ingredients

1. The focus is always on the individual. When individuals are aware, growing, and changing for the better, the company benefits. A satisfied employee is one who wants to make a meaningful contribution and will often work much harder on goals which he/she has had a part in establishing whether personal or organizational.

2. "Ownership" of a process and control over outcomes encourages initiative and active use of the program. If a career development strategy is designed in such a way that minimal outside help is necessary and results can remain confidential, chances are people will participate freely.

3. Company support and encouragement is vital. Time off for participation, personal involvement in the process by members of key management, and response to special requests for something over and beyond the basics will go a long way toward vitalizing a process and energizing participants.

4. Integration of personal and organizational goals and objectives for change and improvement is a powerful combination. If the emphasis is one-sided an imbalance can occur which will lead to conflicts.

Things to Avoid

As in any life endeavor there are always things that can scuttle even the most effective approach--internal and external obstacles that can block an individual's taking full advantage of what might be available. Probably heading the list of internal obstacles is holding either too high or unrealistic expectations for what a program can offer. This can lead to disillusionment and disappointment that will often cause individuals to regress to former levels of thinking and acting. A second self-generated barrier is what might be described as intellectual awareness about one's self or one's opportunities without any real commitment to change or to take the actions necessary to achieve a desired objective. As with all habits, patterns of thinking and acting die very slowly and must be replaced with new, stronger, and more persistent thoughts and behaviors.

Another obstacle rising mainly from within the individual is trying to make large life or career decisions with very small amounts of information. Taking a few tests, filling out some inventories, or talking with someone is usually only the beginning of an exploration process that may require literally months of strenuous effort before good and effective decisions can be reached. The problem is not necessarily one of youth or inexperience but of a hunger for release from present circumstances and a desire to move ahead. Other than youth, people in the 35 to 45 age range experience this problem most frequently, primarily because they realize that their time to make a move is limited. To delay a decision for months when the motivation to change or improve is intense requires a great deal of self-discipline and usually the assistance of objective outside help to maintain a clear perspective.

Though there may be agreement that the primary "stoppers" to growth lodge within individuals, some obstacles in the environment cannot be ignored. One of the barriers that often stands in the way of effective career development is the flux and fluidity in our current job market over which the individual has absolutely no control. Notable in this category is what has happened in the teaching market over the past several years. At one time teachers were always in demand and could find a job of one sort or another as long as they had a valid certificate. In more recent years, however, teachers have difficulty not only in finding a job but in keeping it. Another example is the aerospace industry where several years ago high-powered engineers were constantly sought. Today, with the downturn in the industry, many of those who formerly hired engineers are themselves seeking employment.

Large corporations often reward high performers with compensation packages that include attractive fringe benefits, which cause individuals to feel comfortable and become complacent. The risk of giving up this kind of security that makes the house payments and pays for the children's education, with ample left over for vacations and extras, is one few individuals are willing to take. In any new position, either within the present company or particularly in a different venture, individuals have to prove themselves all over again and often feel the strain very intensely.

A final environmental obstacle to anyone striving for career advancement or change is the other individuals who are working toward the same goals. Competition can be so fierce and keen that highly qualified individuals are simply edged out by others who are more highly qualified. Highly promising performers sometimes arrive at the point where they have nowhere to go within the organization. In such cases some companies have initiated what might be termed "disillusionment" for the purpose of helping these individuals establish a more realistic and hopefully more satisfying career trajectory which may not include a promotion but may provide more depth in the current position and/or opportunity for greater contributions.

Setting Up Realistic Expectations

Research in achievement motivation tells us that the most successful achievers are those who believe that their efforts make a difference, whose thinking is guided by cause/effect reasoning, who establish moderate-risk goals, and who assume full responsibility for their own behavior. These principles are immediately applicable to career choice and career development. Setting a goal beyond one's reach only leads to frustration; setting goals that are achieved too easily provides no real sense of fulfillment and satisfaction. For these reasons a thorough assessment of where one is at the present time is critical before establishing goals and directions as to where one would like to go.

Keeping an open mind and remaining flexible in life and career choices is absolutely essential to maintaining progress in career and life development activities. Because external situations and occurrences are often beyond individual control, contingency plans and options must always be a part of a person's thinking and planning. No business or organization is immune to failure, including our government. To be effective, therefore, individuals must remain sensitive and attuned to their internal workings as well as to occurrences in the external environment. Self-appraisal should neither be taken lightly nor engaged in infrequently. Self-appraisal should be a continuing part of the person's life pattern that enables him or her to cope more effectively with the exigencies of modern-day living.

A Synergistic Model for Self-Exploration and Growth

In use for over a decade, this four-level diagnostic system assists the individual to engage in effective decision-making and planning.[1] The key to the system is a self-discovery process which enables individuals to learn and accept as much information as they wish about their personal characteristics or actual on-the-job performance. Both self and others are involved in the evaluation process. The individual first completes a 240-item self-description inventory (Level I). In Level II people who know the individual fill out the same inventory, revealing their perceptions of the person. Level III involves a more in-depth psychological measure of motivations and values that have long-range predictive value in an individual's career and life choices. Finally, at Level IV, through the Management Practices Audit, the individual's work behavior is examined by both the individual and knowledgeable others, with the result that skills and descriptive behaviors are reviewed, analyzed, and described from a self/other perspective.

In most cases the process takes place in an organizational environment sponsored by the company, but individual results remain confidential, and no disclosure to corporate resources is necessary or offered unless the individual so desires. Thus, the individual "owns" the process and can use it for his/her own purposes without fear of disclosure. The individual most often participates in a group process that examines individual psychology in an organizational context for purposes of both individual and team effectiveness. As a follow-on to most group sessions, members can receive individual counseling to explore in more depth pertinent diagnostic tools or concerns. Though the counseling is always optional, it is invariably sought, and feedback on the experience has been highly positive.

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[1] The title of the system is *Life Styles, a Multi-Dimensional Approach to Understanding Human Behavior,* produced and copyrighted by Human Synergistics, Inc., 39819 Plymouth Road, Plymouth, MI 48170. The program includes four components: *Level I: Life Styles Inventory (Self-Description); Level II: Life Styles Inventory (Description by Others); Level III: Concept of Self Index; and Levels IVA: Management Practices Audit and IVB: Supervisory Practices Audit.*

Since the system is largely self-evaluative, individuals are encouraged to take the initiative some months later to re-evaluate and monitor their progress against established objectives or become aware of changes that have occurred over the lapsed period. Although confidentiality is a byword, individuals often wish to discuss their inventory results and their goals and plans with superiors and/or peers in order to bring these individuals into their support group.

A Case Report

Within the past three years a major career development strategy has been designed, developed, and launched in a large Texas utility. The program is company-sponsored but follows all of the same procedures and guidelines noted above. The key to the success of this program to date is the complete and enthusiastic cooperation of the corporation's upper management team. As evidence of their commitment, they agreed to be involved in the process themselves prior to carrying the approach to the next level. Their participation not only strengthened their support but enabled them to speak from direct experience to the strengths and benefits of the program.

Because the utility has grown so rapidly in the past several years, it has experienced constant influx of new personnel and continuous movement of individuals to higher levels of management and responsibility. In the past, decisions about promotion were made *ad hoc*, based on who appeared to be most qualified at a given point in time, rather than developed according to a systematic and careful plan in which individuals had the opportunity for self-evaluation and decision-making prior to being offered opportunities. Because of this somewhat disorganized approach, many mistakes were made. Individuals were promoted too quickly, before they had achieved a level of readiness, and haphazardly, into positions which were totally inappropriate for their abilities, experiences, or interests. Now that the strategy for corporate career development has been designed, it has been communicated to all eligible individuals in the corporation so they can be aware of how the process works, what steps are built into it that might affect them personally, and what their options and alternatives might be as they take advantage of the process.

Key elements in the program are the following:

1. Self-exploration workshops. In these two- to three-day seminars the four-level diagnostic system is employed to help individuals become more aware of themselves through self-report and feedback from others. Built into the program are opportunities for individual conferences to deepen the level of understanding and to assist in various types of problem-solving activities. The last afternoon is occupied with goal-setting at both personal and organizational levels. After experiencing the self-evaluation workshop, individuals have the opportunity to work on the various topics or skills which they believe are most critical to their growth and development. This is done in consultation with the immediate superior in order to arrange for necessary time off or financial support, and to integrate individual goals with corporate objectives insofar as possible.

At their own discretion, individuals may also elect to re-evaluate their Life Style Inventory and/or request additional individual conferences. In general, they maintain control of their own developmental process within the guidelines and the overall strategy laid out clearly for their review.

The process thus far has generated elements of mutual risk, mutual benefit, and in most cases mutual trust. The risk to the company is that certain individuals may learn through this guided self-exploration process that they are not totally suited for the corporation or that more satisfying opportunities may exist elsewhere. Individuals risk losing their objectivity and clear identity as individuals in a system that is designed by the company and is so strongly supported by executive management. On the other hand, the benefits appear to outweigh by far the potential risks to either the individual or the corporation. Many feel for the first time that they have the opportunity to take advantage of a situation provided by the company. Instead of feeling compelled to participate by company pressure, they find themselves motivated by their own internal desires for growth, improvement, and personal satisfaction.

Conclusions and Recommendations

1. Superiority of integrative exploration and assessment approaches. Discussion of the four major methods for acquiring data about self has included information regarding the trade-offs present in each, i.e., what they do well and what they do not so well. Approaches which depend on a single type of data acquisition such as standardized testing may be strong in the quality of the data acquired but very limited in the range of areas tapped. The same can be said of each of the other exploratory and assessment methodologies. Clearly, the optimum is to utilize an intermix of methods and procedures, customized to fit the intended purpose of the evaluation. If an individual is in the early throes of life planning and wishes to explore a variety of life style options and careers, then the data-gathering tools will be broad-based and include a number of different instruments. On the other hand, an individual trying to make a specific career decision, e.g., whether to move from engineering to management, may need much more pointed and direct information and the choice of instruments will be far more selective. The important concern here is that people not become so partial to a particular method that they eschew broad-scale experimentation which gives them more freedom in selecting the approaches most relevant to a given set of needs.

2. Emphasis on analysis and inference-drawing over data reporting. Assessment and exploration proceeds best when a framework exists on which the vast assemblage of data can be hung and viewed from different perspectives. This compression and analysis is facilitated when there are some specific points of focus. Among the more important of these would be the following: (a) Themes that run through different types of data and persist over the years. For example, one would take careful note of an individual's preference for working alone, or of vocational/avocational

activities which the person performs especially well. (b) Developmental trends over time. Did the person realize certain developmental imperatives and initiate new ones, or was he or she stagnated at existing levels of functioning? (c) Methods of coping with various barriers and problems. What degree of resourcefulness and flexibility did the person reveal in overcoming previous difficulties? Of particular importance to future success in handling new situations is the learning style of individuals and the attention they give to self-renewal. The learning style indices are particularly relevant when making projections about appropriate future plans and decisions.

3. Self-help up to a point. There is no doubt that the self-help movement has encouraged individuals to assume responsibility for gathering self-data and applying what they learn to both short- and long-term plans. Certainly, the involvement of the individual lends credence to the information and fosters personal feelings of "ownership," thereby increasing the probability that the information will be used and acted upon. However, this self-emphasis orientation may go beyond the point of being useful and become a cult. We must remember that one of the most notable and useful components of the self-assessment process involves the perspectives of others, e.g., feedback from peers, subordinates, and superiors about an individual's behavior in general and specific situations. Individual counseling regarding the interpretation, meaning, and applications of the data is also highly important. It is not unusual for even a relatively short intervention by a skilled person to bring about quantum jumps in insights and self-knowledge which can be used by the person in most meaningful ways to make effective plans and decisions.

4. Action planning: the bottom line. Self-exploration can be no more than an exercise in self-aggrandizement unless it leads to something. The real purpose of self-exploration is to provide a foundation from which individuals can clarify directions for future growth and development and initiate plans to achieve their goals. And the more specific and thoughtful the action plans, the greater the likelihood that the goals will be reached.

Good action plans should contain the following: (a) A clear, goal-setting component in which individuals establish and prioritize specific behavioral goals which are achievable and meaningful. (b) Evolution of a step-by-step methodology for achieving the goals. Goals without plans remain good intentions and are seldom realized. (c) Establishment of a viable support network. In the simplest terms, a support network consists of a broad spectrum of people who have the interests and capabilities to help an individual in areas key to fulfillment of the plan. Individuals who will comprise the network should be identified before the need arises. (d) A statement of measurable outcomes expected from the plan. This success formula should include specific standards of behavior against which an individual's behavior can be measured to determine the degree of success in achieving the previously established objectives, as well as images of how the person will be different as a result of his/her efforts.

Self-exploration is an essential ingredient of any career development program. It is exciting but challenging, potentially helpful but frequently laborious and confusing. The key to effective self-discovery is a desire by individuals to identify clearly their goals in undertaking the search and a willingness to use self and others as resources in the process. Having clarified their goals, people can embark on their journey into self with confidence, knowing that they have done what is necessary to make the quest fruitful and rewarding.

executive talents and achilles' heels—a better path through the briar patch

Edward L. Adams, Jr.

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EXECUTIVE TALENTS AND ACHILLES' HEELS--
A BETTER PATH THROUGH THE BRIAR PATCH

(An inquiry into the present state of executive assessment in career development)

Dr. Adams draws upon over twenty-five years of experience as a consulting psychologist to management and as an individual career consultant to examine executive assessment and development practices and their significance for future managers and executives. He views the present state of the art as being somewhere between our heritage from a pioneer society which rewarded native talents and quick resourcefulness on the one hand and, on the other, continuing systematic analysis and planning for achievement in an increasingly complex world. He describes contemporary executive development efforts that are both organizationally and individually initiated and cites examples of both. He predicts future needs in the educational and experience preparation of those who seek to qualify themselves for the role of executive counselor or coach. Everyone, he believes, regardless of basic and learned abilities, has his/her Achilles' heel, and unless such critical characteristics are identified, recognized and modified, individual potential will never be fully realized and may, in fact, become self-destructive.

Do Executives Have Human Failings?

Since World War II, more and more companies have recognized the value of and need for executive assessment and development in the interest of improved company achievement. Even after thirty-five years, however, numerous companies--some of them sizeable--still ignore this trend, and thousands of executives and would-be executives fail to make a systematic analysis of their own characteristics and needs. What might be some of the causes of this seemingly self-defeating behavior?

Folklore concerning executives is replete with naive assumptions, many of which are accepted by executives themselves as uncritically as by the public--even when evidence to the contrary haunts most executive suites. Some of the more common of these include the following:

1. Brainpower, drive and education are all that is needed for executive achievement.

2. Executives are always able to act rationally in their own best interests.
3. The higher the executive the less likely he is to make mistakes of perception, judgment, etc.
4. An executive who manages hundreds or thousands of other people must certainly know how to manage himself.
5. Success results primarily from riding the coat-tails of an able "sponsor."

Historians, philosophers and dramatists (long before psychologists) have rarely shared such beliefs. The mythology of ancient Greece, for example, tells the story of the almost invulnerable warrior-hero, Achilles, who could be wounded only in the heel (due to a slight oversight of his goddess mother). And so, of course, after many memorable triumphs, he himself finally succumbed to an arrow in the heel--much to the amazement and consternation of all concerned who had believed him invulnerable.

Shakespearian tragedy was built around unusually gifted or powerful figures, each of whom had his unique tragic flaw which brought about his ultimate defeat and death. Macbeth, Hamlet, Othello and the others were all defeated ultimately by a personal character trait--not by outside forces.

And then there is Dr. Lawrence J. Peter, author of The Peter Principle, who has demonstrated how even very competent people inevitably tend to be promoted to the level of their incompetence.

The point is, of course, we should recognize that everyone has personal traits or behavioral tendencies that are:

1. usually not clearly recognized by the individual him/herself,
2. characteristically beneficial up to a certain point but self-limiting or self-destructive for the individual beyond this point,
3. so deeply intertwined with other characteristics that it is very difficult for the individual to identify and control them without some form of external assistance.

The range of self-limiting and self-destructive patterns is almost unlimited in terms of both their variations and combinations within individuals and the varied, organizational or interpersonal settings within which they occur. To add to the confusion, most of the potentially destructive qualities have roots in desirable qualities, as, for example, when myopia, indecisiveness and inaction under conditions too complex to be handled by familiar patterns of behavior result from attention to detail and perfectionist standards of personal performance. Sound familiar?

Executive Assessment and Development Needs

Executives need objective and systematic input about their own characteristics. Obviously, they need to identify self-limiting and self-destructive tendencies; but they should search at least as diligently for positive or potentially positive characteristics and for opportunities to combine and build upon these over a period of time in order to support higher levels of performance later. Busy young engineers, accountants, and lawyers, in their preoccupation with the day-to-day technical requirements of their work, too often ignore the career analysis and planning that could greatly enhance future opportunities.

In essence, would-be effective executives need to reject most of the old assumptions and folklore about executive career progress. They need to make a conscious decision to take a more active and insightful role in managing their careers. But having made such a commitment, how do they get started in the implementation process?

Appropriate role models abound in athletics and the performing arts. Aspiring skaters, golfers, tennis players, singers, dancers and many others seek out the services of experienced coaches. Good coaches understand thoroughly the mechanics of a skill, are skilled observers of performance and can communicate effectively regarding needs for slight adjustments. Coaches with this combination of qualities are often hard to find in any field, and more often than not they have not been outstanding performers themselves. Instead, their skills lie in coaching and developing others.

Effective executives and those who aspire to this role need this kind of coaching relationship, for in many ways they are "performers" quite as much as those mentioned above. To be sure, they usually have some area of basic knowledge (engineering, accounting, or others), but managing their human, financial and physical resources, and most importantly themselves, is an exercise that far transcends sheer knowledge. Good coaches help such individuals make a systematic inventory of their present and potential characteristics, help them plan appropriate self-development programs, and give them continuing objective feedback concerning their performance. Best qualified "coaches" for such complex human relationships are usually fully-qualified psychologists who have also had extensive experience with organizations.

How the Process Starts and Continues

The sponsorship or sources of initiative for the many ways individuals become involved in the career coaching process can be grouped generally under two headings: (1) organizational initiative and (2) individual initiative. There are many common elements in the process, regardless of the source of initiative, but there are also some distinct differences which relate to the crass reality of who pays the coach. Let us examine the salient factors in each of these conditions.

A. Organizational initiative in executive career development. Here the individual executive, whom we will call Joe, finds himself in a company-wide management development program whether or not he is personally motivated to be there. Hopefully, the chief executive officer of the organization (Frank), realizing that his own involvement is essential to the success of company-wide management development, personally leads the way through various parts of the process--psychological assessment, feedback, determination of broad objectives, action plans and periodic progress reviews. This personal involvement from the top usually motivates Joe to try it out and certainly makes it difficult for him to refuse. It is easy to see, however, that in any group of executives who are thus inducted into executive development, the level of enthusiasm, cooperation and personal effort will vary greatly. The stage has been set; but the effectiveness of executive development efforts will depend upon the skill of the psychologist in establishing productive relationships with each executive, the continuing support and involvement of top management in the program, and the amount or quality of undeveloped potential within each executive involved.

Another important variable in this situation is that the organization is the primary client and fee-payer. While the optimum development of individuals is an important joint objective of both management and coach, there may be times when the interest of the organization must come first--just as is the case of a football team with too many would-be quarterbacks and not enough defensive backs. Also, while confidentiality is hopefully always maintained regarding specifics discussed in interviews, management usually receives a summary report indicating areas of relative strength and weakness. Since Joe and his peers and subordinates are aware of this, there can be little question that some executives may give more attention to attempted gamesmanship with the psychologist than to honest self-development effort.

On the other hand, this kind of organizationally-sponsored career development holds many potential advantages for the individual executive, and many of the most able individuals recognize this and take full advantage of it. In the first place, very high potential individuals are usually identified early and are provided additional opportunities to develop their areas of knowledge, management skills and self-insights. They are also able to use their organization as the laboratory of their personal development under sympathetic and insightful guidance. For example, if Joe experiences some problem in relating effectively to Frank (his superior), this relationship can be explored with the psychologist and more desirable patterns developed. In turn, Joe can learn to develop more patience and insight in dealing with his own subordinates and may even recognize over the years some similarities between his relationships at home and at work--an insight which frequently helps both. Best of all, the opportunity for this kind of infrequent but continuing "coaching" over a period of years is free to Joe because the organization pays the bill.

It is not suggested that this kind of "coaching" by a management psychologist should represent any total program for career development. Far from it. Appropriate management seminars, well-designed and executed work-planning and review sessions with superiors, and outside courses, community and professional activities all should contribute to individual career development. The psychologist "coach" can play an important role, however, in selecting such activities to meet individual developmental needs and in coordinating these with anticipated future roles. The psychologist maintains a close and continuing relationship with top management so that he/she is aware of management needs and plans and can in turn provide professional insights and suggestions relative to the utilization of human resources. The psychologist should work closely with Personnel, but as an outside professional he/she is often in a position to provide more independent recommendations.

B. Individual initiative in executive career development. The individual executive or junior manager who is not involved in an organizational executive development program needs to take more initiative and responsibility in assessing broadly his/her own career development to date in terms of long-range (10+ years), broad objectives. Many people experience vague dissatisfaction with their present situation, but find it difficult to know where to start in analyzing themselves and their situation objectively and systematically. For mature individuals who are concerned about developing their own potential, the following brief questionnaire is often a good starting point. (See next page.)

When individuals conclude that they need and/or want professional assistance with their career development, the first question to face and answer is how much is such service really worth to them. If the value budget is low, it will usually be possible to secure some informative testing at university counseling or placement offices or at some government agencies. The price will be low, but the career counseling very limited.

On the other hand, paying "top dollar" does not necessarily guarantee top value. Unfortunately, many of the most expensive, broadly advertised and lavishly appointed "career" services are little more than dressed-up placement agencies. One may get a list of addresses from them, and perhaps even some referrals, but very little if any valuable career counseling. For this the typical fee is several thousand dollars.

What, then, is the solution? The solution lies in understanding the nature of the problem and making adjustments accordingly. Some elements of the problem include the following conditions:

Inventory of Career and Self-Direction Conditions*

The following statements enable you to take a quick inventory of yourself along these lines. Consider each statement carefully and then assign a numerical rating to it according to the following scale. If an item does not apply to your case, mark it NA (not applicable).

Strongly agree - 4
Largely agree - 3
Uncertain - 2
Largely disagree - 1
Strongly disagree - 0

___ 1. I generally enjoy my present work.
___ 2. I have a good understanding of my personal potential.
___ 3. I have an opportunity to use and develop my potential in my work.
___ 4. I have a good understanding of my own life values.
___ 5. I have developed mid-range and long-range objectives for my life.
___ 6. My present work is part of my game plan to reach my objectives.
___ 7. I maintain a personal development five-year plan for myself.
___ 8. I feel I am making generally satisfactory progress in my work and career.
___ 9. I believe my work performance would rank at least in the upper 25% of those at my level in my field.
___ 10. I have a good understanding of my relative strengths and weaknesses in my work.
___ 11. I have developed an action plan for improving the quality of my normal work.
___ 12. I make a continuing conscious effort to develop ideas or programs for work improvement, above and beyond handling my regular work.
___ 13. I have a good understanding of how my superiors perceive me.
___ 14. I have a good understanding of how my customers, clients, etc. perceive me.
___ 15. I have a good understanding of how my peers and/or subordinates perceive me.
___ 16. I devote at least four hours a month to planning my activities and analyzing the results.
___ 17. I have a good understanding of the kind of business or professional role I expect to achieve.
___ 18. I am generally satisfied with the blending of my business or professional role with my family.
___ 19. I am well-prepared to assume the next level of responsibility.
___ 20. I have prepared a replacement for myself in my present role.

To gain an idea of how effectively you are managing your life and career, add your scores on the questionnaire and divide the total by the number of items on which you could fairly rate yourself.

If the resulting average score is below three, you are probably not managing yourself as effectively as you could and you might well profit from well-qualified assistance.

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*From Achievement Planning Calendar, copyright 1978, Edward L. Adams, Jr., Ph.D.

1. There is no quick, easy solution to anyone's career problem or definition of career opportunities.

2. Many kinds of information about a person need to be gathered and analyzed by a properly trained and experienced professional before such an individual can make tentative judgments and recommendations. This process alone takes time--a minimum of six or seven hours.

3. Properly qualified consultants in this field should generally be trained psychologists at the Ph.D. level who have had at least several years of experience in working with multiple organizations of people. Such psychologists make at least $500 a day working with organizations and often are not inclined to work with individuals on an hourly basis for a lesser fee. Their training, experience and value are at least comparable to those of experienced lawyers and certified public accountants, many of whom earn the same range.

4. Assuming that the data-gathering and analysis process has been very complete and accurate, there is still and always the next step of determining how the findings fit the individual's perception of him/herself and personal goals. Typically, there is some area(s) of disagreement, even when the client generally agrees with the findings. This does not mean that either the data or the individual's perception is incorrect, but it does indicate the need for further discussion--which takes more time ($s).

5. Once the client and the psychologist reach general agreement concerning the analysis, broad career objectives and appropriate action steps should be designed--again more time ($s).

6. Often the client needs an opportunity to probe new frontiers, to discuss his/her experience with these and to define the personal meaning of these new experiences (more time [$s]).

7. Regardless of the accuracy of the analysis and of the individual's enthusiastic agreement concerning objectives and action steps, complete change in the prevailing patterns of an individual is very unlikely--especially in the near future. Satisfying modifications are probable, but frustrating relapses into previous patterns are to be expected. These need to be worked out conversationally in such a

way that the individual gains further insight and progresses to the next level of competence in self-management. Over a period of time these refresher contacts tend to become less frequent and the individual becomes increasingly skilled in avoiding self-limiting or self-destructive tendencies.

It is obvious from the above enumeration of typical conditions in career coaching relationships that the process cannot be accomplished quickly, cheaply or perfectly for all time. Most outlay of time and expense should occur within the first month or two when the basic data-gathering and analysis take place. This only provides the basic foundation of understanding, however, upon which clients/coach can make future plans, actions and reviews with increasing refinements. Clients frequently fail to understand this sufficiently and feel frustrated if they find themselves with similar career problems a few years down the road.

An individual's career is not unlike the individual's body, teeth and tax position. Each individual has his/her own unique pattern of conditions in each of these areas, but some modifications can be expected from year to year which, in some cases, can drastically affect the overall well-being of the individual. Prudence suggests that we consult our internists, dentists and tax advisors at reasonable intervals to be sure that we are not ignoring important changes. The same applies to our careers and to our periodic reviews with a career coach. This is particularly true for very capable and ambitious individuals who wish to maximize their achievements in competitive environments.

Executive Development in Organizations

When the chief executive officer recognizes the potential organizational value of systematic executive development and commits him/herself to a continuing program to this end, many constructive changes can occur within individuals and within the organization as a whole. Conversely, favorable conditions for individual and organizational development do not necessarily continue if the top management abandons the attitudes and actions that created them. The following brief case study illustrates the results of two successive patterns of management behavior.

> The XYZ company is an established company some sixty years old and has approximately 1,500 employees. It was family-owned until about fifteen years ago when it was taken public by the then president and chairman, a third generation family member. We shall call him Frank.
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> Frank was eager to develop the company after two decades of very passive management by his father. He recognized, however, that in order to do so he would have to develop a younger and more aggressive management team; fortunately, most of the upper level executives were approaching retirement. He had heard about a firm of consulting psychologists to management from a friend of his at the Young Presidents Organization and decided that they might be able to help him accomplish his objectives. Dr. Smith, a consultant from the firm, came to discuss the situation with Frank, and together they decided to move ahead.
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> The first step was a full psychological evaluation of Frank, since as Dr. Smith said, "You are the person who creates the climate within which others work, and, therefore, we must begin by securing a better understanding of you and your impact on your people if we are to help you in building your team." A week later Dr. Smith discussed his written evaluation with Frank. He then moved on to evaluate similarly each of the executives reporting to Frank after they had been informed of Frank's general objectives to develop the company through developing people.
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> Over a period of the next three years, several significant findings and events occurred as a result of Dr. Smith's four days a month of conferences with Frank and other members of management. Dr. Smith had been able to recognize some of these events early as probable developments, but he could also understand that some changes would have to evolve gradually. Other events developed from circumstances and from individual and group discussions.
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> 1. The first three levels of management (about 40 people) received full psychological evaluations by Dr. Smith which were reviewed with each individual, with Frank, and with any intermediate managers. Here, as elsewhere, the emphasis was upon individual capabilities and behavior patterns that would bear upon the future objectives of the company.
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> 2. It was agreed that none of the six executives reporting directly to Frank would be suitable replacements for him in the event of an emergency, with one possible exception who had only two years left before retirement. Of the other five, three would retire normally within three years. The other two were within ten years or less of retirement and lacked either the desire and/or the dedication for top management.

3. At the next level of management, there were two or three individuals who might possibly have the potential for top management, but they were generally regarded as five years or more away from readiness for this level, and none of them appeared outstanding at this point.

4. It became increasingly clear that management philosophy and practices over the better part of twenty years had discouraged initiative, creativity and continuing education while encouraging advancement by seniority, bland performance reviews and jealously protected domains of authority. A major change in these areas would have to be brought about without severely impacting the present organization.

5. It was decided that impetus for change would have to come either from outside or from the third level of management. Because of the traditional inter-departmental jealousies, representatives of this third level or below would have to find opportunities to communicate with each other without involving second level management. Accordingly, the President appointed a Personnel Planning Task Force which included representatives from each department. The quality of those selected immediately established the status, morale and general recognition of the group, and its avowed purpose was to take responsibility for developing the highest possible quality of younger management personnel.

6. As a way of energizing and giving initial direction to this group, the members were assigned the task of reviewing systematically all management personnel within the two levels below them. In preparation for this meeting, Dr. Smith developed and administered to the selected individuals a short assessment that provided a brief and objective estimate of each individual's management potential and areas of needed development. He then helped the Personnel Planning Task Force develop a format for reviewing each individual. The entire Task Force then discussed each individual in some detail (a previously unheard-of procedure) and designed a developmental program for each for the coming year. In this process, Dr. Smith participated as one of the group.

7. As a result of this systematic review of all management personnel, the Task Force identified many needs and developed projects to address these needs during the coming year. Working on these projects caused members of the Task Force to develop a more sympathetic and cooperative attitude toward each other's areas of line responsibility and considerable enthusiasm for what their projects could mean for the future of the company. They presented quarterly progress reports to the president and received strong encouragement for their activities.

8. Many significant changes occurred in the company as the study and recommendations of the Personnel Planning Task Force went forward. Among these were the following:

a. A ladder of outside management training programs was developed for the top three levels of management for the purpose of breaking down old attitude patterns and providing stimulating new concepts and practices, i.e., promoting a receptive climate for change.

b. An internal management development program was designed to provide a sequence of career broadening experiences for younger management personnel--especially for the most promising, who were encouraged to plan on experiencing work assignments in at least two or three of the company's functional areas instead of rising through only a single area.

c. Several upper level retirements occurred and a few other shifts in assignment were made for the purpose of removing roadblocks and opening opportunities for younger and more aggressive managers.

d. A program of monthly, one-to-one work-planning and review meetings was established at all levels of management--starting with the President and his Vice-Presidents. This program was mandated by the President and served many developmental purposes. It provided much tighter linkage among all levels as well as a mechanism for regular communication, goal-setting and performance review.

At the end of three years, great progress had been made in reorienting the company, with minimal dislocations. Morale was high and plans were in place for aggressive new product development and marketing. Frank had been planning tentatively to make Jim Jones (a newly appointed 38-year old Vice-President of Marketing) President in about two years at which point he would limit his role in the chairmanship.

Unfortunately, Frank had a massive coronary attack and died. The Board decided to import a president as soon as possible. A search firm located Bill Doe who appeared to have excellent credentials and a very keen mind. Initially Bill impressed everyone in the company, but before long it became evident that Bill had great difficulty accepting any insider's judgment but his own. He discontinued work-planning and review sessions as a waste of time; he disbanded the Personnel Planning Task Force as an intrusion on line authority; and he quickly brought in two outsiders, negotiating early retirements with the incumbents. Quite predictably, morale plunged and mutual cooperation was replaced by suspicion and political infighting to keep "in" with Bill. Productivity declined, but an aggressive program of acquisitions tended to obscure this fact. Jim Jones and several others who had been developing rapidly under Frank left the company within a year; and after a few months, during which Dr. Smith attempted to communicate with Bill about dangerous trends, Dr. Smith's services were terminated.

> Bill may or may not survive in his role with this company. He is bright, purposeful, and personable when he wants to be, and he is sufficiently political to keep his "flanks protected" with the Board. What is certain, however, is that whatever he achieves will be in spite of his self-limiting characteristics, and that as long as he has these he will never attract the enthusiastic support of strong people in any team effort.

Executive Development by Individual Initiative

Individual executive development should always begin with a systematic psychological evaluation of the present characteristics and history of the individual as these facilitate or handicap movement in possible career directions. Through a series of conferences, the individual establishes broad objectives and develops action plans leading toward them. Usually these will include:[1]

1. Work performance projects--to make qualitative and quantitative improvements in meeting normal job requirements.
2. Work improvement projects--to use imagination and initiative in modifying present work routines in the direction of greater efficiency and/or satisfaction.
3. Self-development projects--to increase the individual's knowledge, skills, experience or confidence, through seminars, university courses, independent reading, etc.
4. People relationship projects--to gain greater understanding of, and better relationships with particular people, or with people in general.
5. Self-management projects--to eliminate or reduce self-limiting and self-destructive behavioral patterns and to develop greater skill in constructive self-management.
6. Community and professional projects--to build into one's life appropriate amounts of exposure to groups and activities that provide a change of pace and direction from daily work relationships.
7. Recreational and family projects--to provide balance and satisfaction in one's total life space.

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[1] Adams, E. L., Jr., Career Advancement Guide, McGraw-Hill, 1975.

Individuals who are seriously dedicated to making optimum use of whatever talents they have or could develop are encouraged to remove such projects from the realm of "good intentions" by putting their plans on paper and then programming the necessary action steps into a calendar designed for this purpose.[2]

Career development does not occur through any one-time effort. Rather it requires continuing attention and the kind of periodic maintenance that people expect to provide their house or automobile. Over a period of time, investment of appropriate time and funds in the systematic development of one's own career can be richly rewarded--in terms of both achievements that probably would not have been accomplished otherwise and the inner knowledge that the individual him/herself "made it happen" instead of just drifting on the current.

Space limitation prevents extensive case history descriptions, but two typical situations can illustrate the fact that even seemingly very successful men all too often have their individual "Achilles' heels" that can be treated.

> John Jones was a talented engineer-MBA. He was creative, fast-moving and very aggressive. He was, in fact, so aggressive and able that in one job after another his rapid rise would create overt or covert opposition which would cause him to jump to another company--only to repeat the pattern. Finally, he began to "sense" the pattern to the extent that it worried him and caused him to seek assistance. During his exploration and analysis of the effects of his behavior on his work relationships, he discovered that his wife had had an affair in one of his earlier job locations and he could not imagine how this could have happened to him. Over a period of time spent in consultation (coaching), he began to recognize the nature, origin and results of some of his relationships with others (including his wife) and was able to plan specific changes. A few dramatic improvements occurred quite rapidly, but there were also frustrating instances of "backsliding" which diminished in frequency over a period of time.

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[2] Adams, E. L., Jr., Achievement Planning Calendar, copyright 1978.

> Joe Smith was a very different type of achiever. He, too, was very bright but was also endowed with a very youthful appearance and warm personality. During the early years of a manufacturing career, he was highly successful in motivating teams of people to cooperate with him for spectacular accomplishments. He played the "boy-wonder" role very easily until he reached vice-presidential level where systematic analysis and planning became more important than direct motivation of people and trouble-shooting. He was not well-prepared for this very different role or for the criticism that began to replace applause. He experienced rather severe psychosomatic anxiety symptoms and sought assistance. Over time Joe learned a lot about the nature of his problem, how to control some of the anxiety, and some approaches to a more sophisticated management approach. He is still, however, grappling with problems of personal organization, detailed analysis, and planning which occasionally cause him difficulty.

Future Directions

The United States and Americans are still working their way through the primitive heritage of a pioneer society which rewarded native talents and quick resourcefulness rather than sophisticated analysis and planning. The advent of computer technology and painful economic realities will greatly accelerate the need for individual and organizational modification of this pattern. We will be wiped out by more purposeful and systematic competitors if we do not individually and collectively give more attention to where we are going, what and by when we must attain intermediate goals and how we can best accomplish our mission(s). Careerwise, this translates into the high probability that we can no longer afford the luxury of being casual duffers on life's golf course. We will probably have to consult the "pro" and take some lessons.

As we move in this direction, it will become more important to know what we should look for and avoid in a "pro" or coach. This may well result in the development of a new career track for those who would aspire to this role. Certainly, such a role should require a substantial graduate education (probably Ph.D. level) which would emphasize normal and achievement-oriented psychology and counseling. Such an educational program should also include a basic orientation (perhaps undergraduate) in business administration subjects. Other helpful educational contributions would include conversational fluency in one modern language, thorough competence in written English and selected courses in history, political science, anthropology, sociology and English literature.

Career preparation for such a role should include as wide a variety of work experiences (including factory) as possible during summers or work-study terms. A four-year term as an officer in military service immediately after college and before graduate work would be an excellent broadening and maturing leadership experience. All of this should prepare the would-be "coach" to begin a form of post-doctoral training in a large consulting firm at about age 30--the earliest that most consultants gain much credibility with organizations or mature executives. He or she would, in effect, be entering professional practice at about the same age that most physicians are fully qualified in their fields--and why not? Next to their physical well-being, their career must be of major concern to most people, and they should not expect to have inexperienced amateurs playing around with it.

As the need for career coaching becomes more obvious and the qualifications for practitioners more demanding, young people hopefully will give greater attention to long-range planning, as opposed to settling for immediate satisfactions. They will also learn, however, that career development is a continuing, life-long process--not something that you go through once and you forget about. Achievement-oriented people from about eighteen on will be likely to establish a relationship with a career coach and make periodic visits to be sure that they are not ignoring some self-limiting condition.

It is also probable that as people move in this direction, universities and other agencies that provide management seminars will work closely with career consultants, recognizing that no matter how excellent a group management program may be, its value will be minimal unless the individual is helped to translate it into feasible actions in his/her own environment.

Summary

Over three hundred years of experience and tradition as a pioneer society have left their mark upon American patterns of meeting challenges, making decisions and coping with the future. However, the wilderness with which our ancestors contended has largely disappeared--and with it the opportunity for people to rely upon raw day-to-day resourcefulness to meet their needs.

Within this century we have recognized increasingly the importance of formal education, but we are still uncertain concerning the need for systematic analysis and planning with respect to individual careers. The "roulette wheel" approach to careers is still the prevailing pattern for the great majority, and even achievement-oriented executives and professionals have only begun to examine their own characteristics for possibly self-limiting or self-destructive tendencies. Such tendencies exist like dormant disease cells in even the most accomplished individuals. They lurk in wait for the right combination of pressures to bring down their proud host; and even when they do not attain virulent forms, they typically limit their host's operating effectiveness.

Over the last thirty years organizations have increasingly recognized the need for systematic programs of executive assessment and development. Some of these have been very productive; others have offered little more than lip service. They have, however, drawn attention to the fact that neither organizations nor individual executives need to be sick or desperate to profit from systematic analysis and planning aided by the objective insights of outside professionals.

As organizations have given credibility to the need for executive assessment and development, individuals who are not involved in organizational programs have begun to recognize their own needs for such professional assistance. In this process, the focus of the psychologist has turned from therapy for disturbed and handicapped individuals to helping high potential individuals make more effective use of their talents. This role has become similar to that of the coach of high talented athletes and performing artists who does not expect to be working with the fundamentals of the sport or art, but rather with the small but important performance variations that can make the difference between mediocrity and stardom.

This role change for the psychologist suggests the need for a careful review and revision of professional training programs for persons hoping to enter this field. Clients in this potentially very large market are perceptive people with high expectations and standards for the professionals with whom they wish to associate. The qualities that have made good clinicians are not necessarily those that are well-suited to this emerging role.

Effective leaders in all fields find themselves working increasingly with and through people as their responsibilities broaden. Subject knowledge is not enough in itself; it must be blended adroitly with the skills of managing people. Management skills can be learned theoretically from books and seminars but ultimately must be applied "back on the farm." This is where the executive needs objective, professional feedback as well as the self-knowledge that is the foundation of effective self-management and self-direction. Development of refined insights and skills can be aided by periodic contacts with a professionally qualified career "coach." And achieving such insights and skills can reduce considerably the hazards and discomforts of the executive "briar patch."

a basic approach to the performance review

Robert J. Gary

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A BASIC APPROACH TO THE PERFORMANCE REVIEW

In this informal article, the author discusses the performance review, defined as a review of a contract between two parties, in terms of its purpose and the rationale for undertaking employee evaluations. Seven basic principles are delineated, along with a sequential model suggesting how to prepare for and conduct a performance review. Also presented is a mini-review, a simple test by which would-be reviewers can assess their own standard of performance. The intent of the article is to encourage the use of performance reviews and to describe a methodology that is direct and effective.

Introduction

A few years ago a company was performing a service for Texas Utilities Generating Company (TUGCO) and it was that company's time to be reviewed. It was my pleasure to call the company and advise them as to how they had performed. I was looking forward to the call because I hadn't had a very good day and I thought I would appreciate the opportunity to share some good news because that company had been an outstanding performer.

As the gentleman answered the phone, I identified myself by saying, "This is R. J. Gary, Executive Vice President and General Manager of Texas Utilities Generating Company. I'm calling to speak to you about your service for us during 1976. In a sense we would like to give you a performance review."

After identifying himself, the voice on the other end said, "Pardon me just a minute--let me get my brother." He said, "You see, I'm the inside man for our company and he's the outside man, and he has all the contacts and he talks to all the people we serve."

I indicated to the gentleman that that would not be necessary, that what I had to say would only take a few minutes and he could share the review with his brother at a later time. I advised him that I was representing all the employees at TUGCO and that this review had come about as a result of our determination of who had done a good job and in some cases who had done a bad job.

He said, "Oh my gosh, let me get my brother!"

Again I calmed him down by saying, "That won't be necessary; you can pass this word along to him at your convenience. Let me just tell you that we feel you have provided an outstanding service in all areas during the past year. Your engineering was good, your technical assistance was excellent, your commercial position with us was good, your attention to detail was more than we expected, and you scored high on all performance areas. In fact, you performed better than a number of companies that are a hundred times as large as your company."

He said, "Oh my gosh, let me get my brother."

Again, I told him that that wouldn't be necessary. I had communicated the information we wished to share and I was pleased to do so.

He said, "But you know, I don't even know where your office headquarters is located."

I said, "Well, that's not important. Whatever you are doing is just right. Just keep on doing what you've been doing for our folks."

He said, "But I've never met you."

I said, "Well, that's really not important either."

He said, "Well, when we're downtown in Dallas sometime, my brother and I would like to come by and see you."

I said, "That will be fine. In fact, if you come by, maybe we can have a sandwich together."

Now to this day we haven't met, but I understand from many of our folks in the field that the service has increased tremendously from that operation--even better than it was during that peak year. So I became very interested in that particular performance evaluation and I asked around to find out why was he better? Why did his company rate so high? And what did they do? Some of the folks told me we had a particular technical problem and that we were wearing out certain parts at a very high rate. What he was doing was sending replacement parts and/or repairing defective parts just as fast as we could send them in. One day he decided on his own to find out from a technical group why so many of these failures were occurring. After his investigation, he figured out how to reduce the number of problems we were bringing to him--which meant that work in his shop would be reduced about sixty percent. In other words, he would lose two-thirds of our business by helping us solve the problem.

Well, that's a beautiful story on a performance review and the result, but that's not the end. The end is that he's still a high-level performer. He gets a considerable amount of our business, and he certainly has the respect and admiration of our people. He goes out of his way to do the best job he can. And it keeps his shop full of our equipment problems.

What is a Performance Review?

It is a review of a contract between two parties. Now you can talk about it forever but that's about all it is. It can be between two parties, two companies, two groups, or any combination of these. Yes, I've even heard that performance evaluation occurs when you tell your wife how much you enjoyed the dinner you had last night. Now that doesn't always work out as well as the little story I just told you, but in a sense that is a performance evaluation.

What is the Purpose of a Performance Review?

The purpose of a review is simply to do two things. Usually an employee wants to know if the boss knows how he's doing. If he's doing well, he wants the boss to know it; if he's doing poorly, he wants to know if the boss knows. Now from the other side of the table, the boss wants him to know that he knows. So both sides of the review table have the very same objective in mind and both should work to that end.

Why Do Performance Reviews?

I feel that performance reviews are the ingredient in business or life that makes a person or company move from mediocre to excellent. If you find companies or people who don't do business reviews or don't do performance reviews or don't really add it all up once a year, then you find folks who really are not proud of their business, are not interested, or are really slipping away from it.

The reason I do my own income tax is that it provides a good family business review at the end of the year. My wife wishes I would give it to someone else and forget about it, but that's the way we do it and we have a good time doing it. And I believe I know more about our family business than I would if I didn't do the income tax. I think a review helps a business have that little glow, or makes an individual just that much different from the guy who doesn't have one.

Basic Principles of a Performance Review

There are a few basic principles which make performance reviews "work." Now, obviously, there are many variations that you could use and I'm only going to list about six or seven. But I think these encompass the main principles. I don't classify myself as an expert. I just happen to believe in performance reviews, I work at them, and I think I try to follow many of these ideas. Feel free to copy them or get some better; and if you come up with any better principles, please share them with me and others. I'm always open to suggestions for change.

1. Keep it simple.

2. Make it good for both parties and have both parties participate.

3. Have a good understanding of what the job is and what the standards of that job are.

4. Update it yearly. After one or two years if you don't update it, it grows stale and is not worth doing.

5. Do reviews two levels above. That means, do the reviews for all the people who report to you, and then tell your boss what kind of job they are doing. That takes the personality problem out of the review. If you should be removed from the scene by getting a better job, for example, somebody still knows how the employees are doing. There is a great amount of security in knowing that somebody else also knows how you're doing--especially if you're doing a good job.

6. Do a review as often as necessary but at least once a year. Many people say, "Well, I see Joe every day and we talk about the business. Why should we have a business review?" That is just not like sitting down once a year and talking about it. For example, you see your family every day--but wouldn't it be great if you sat down once a year and examined what you all did last year and decided what you're all going to do next year and tried to match that up with your capabilities financially, physically, and every other way.

7. Make the review sincere. I think this is the most important point and the most practical, down-to-earth principle. When I say "sincere," I mean make it meaningful. Show that their efforts made a difference (good or bad). Make it plain that there's no feeling of anger or of being upset on your part about the deficiences, but by the same token you're not going to double their salary for just doing the job. But make it sincere--and hopefully, from both sides of the table.

Preparing For and Conducting a Performance Review

Many of you have asked me how to prepare for and conduct a good performance review. There is some homework to be done before the review, so let me answer that question from ground zero. I'm convinced that everyone needs a good boss. If you don't have one, you ought to make one. If you make a good boss, that means you ought to be a good boss to your subordinates. So if you're thinking about the boss-subordinate relationship in getting ready for a business review, then the first thing I think you have to do is to define and agree upon what the job is. Now, if you don't do that, you will never have a good business review. You'll just sit down and have a good conversation. You might enjoy a visit about the work; but if you don't define the work and agree on what is to be done, then there is no chance of a successful performance review.

Second, set some standards of measurement against which to evaluate the job. If you can measure the performance, it's much more understandable during the review. If there are no measurement criteria, then there really isn't a lot to talk about--it's all subjective. You have no feeling of what was supposed to be accomplished. The subordinate has no feeling of when he has finished a job, or of when he has done well or poorly.

Third, have plenty of one-on-one time on the job so that you both know and understand the ins and outs of the work. Don't just assume that you know how tough it is out there. Be sure that you see some of the problems firsthand. Don't assume that the job is easy. Go look at it, be involved, listen on a day-to-day basis, add it all up and put it together--but you have to do that by close contact in a one-on-one relationship.

Fourth, prepare at least an hour or two for the review. This varies. The first one takes a little longer to prepare, but subsequent reviews probably shouldn't take that long. Spend whatever time it takes to get everything ready for the review. Now, since every supervisor has a limited number of people reporting to him, then one or two hours per person per year does not tax your supervisory time in any great amount. In fact, it is the best time you can spend if you spend it properly.

Fifth, set a time and place to meet that will allow maximum attention to the subject of review. Don't pick a place where you'll be interrupted by distractions of phones and other people. Give your full attention during that time. It's important for many reasons, but it is also a courtesy to the individual being reviewed. There are many things he would like to say when he has the privacy that he wouldn't say otherwise.

Sixth, split the review time to allow the subordinate the time needed to say what he or she thinks is important. A lot of people feel that the subordinate should be given three-fourths of the review time. I don't think it's that important unless you are completely lopsided one way or the other. Make it as normal and comfortable as possible for both of you, but be sure you don't take more than fifty percent of the time.

Seventh, these are the items I feel are important to cover in preparing for and conducting the review:

1. Review the overall performance.

2. Note the performance against the standards.

3. Determine if more than the job was done and give credit for that.

4. Talk about what's coming up next.

5. Review the individual's personal development needs.

6. Determine with the subordinate what you can do to help him/her reach the goals you assigned or goals made by the subordinate that are related to the business.

7. Most important of all, don't leave that review table until you have developed a new set of standards for the coming year. The old standards may or may not have been achieved, but both of you need to set some new ones. This may mean some standards need to be reduced, some increased, some dropped, and some new ones added.

These seven points are not inclusive by any means, but they are vital areas in preparing for and conducting a review. Many times people find it difficult to get started doing reviews. I have suggested that they work closely with a vendor who is supplying them a service and then give the vendor a mini-review--the review being about what you both agreed the work would be. Then judge in your own mind if that was a fair analysis and appraisal of their performance. This sometimes turns out to be so interesting that individuals come back and tell me that it has taken the mystery completely out of a performance review and has almost turned them around to believing that you can't live without it, that you are doing a disservice to your subordinates if you don't do a review. That's the way you ought to feel.

Remember, whenever you give a review, it is the review of a contract. You want someone to know how they did when they're ready to collect payment for that service, whether it's a vendor, an employee, or whoever.

How would you like to get a performance review from someone who does business with us? Let's just assume for a minute that he might say, "You don't pay your bills on time." "Your personnel do not work well with our people when they are in a plant." "You give us poor data to use in answering your technical questions; therefore, our answers are poor." If we received these comments, we would change our ways. The fact of the matter is that we would be highly embarrassed, and we would set in motion policies, practices, and procedures that would clear up those problems immediately. What makes you think that an individual won't do the same when he knows what his problem is? Any time you inform an individual of how he is doing, you must accept the principle that he wants to improve. If you don't start with that principle, then the whole purpose of the review becomes meaningless. And all the reviews in the world aren't going to help an individual because he's not interested in improvement. The truth is that his personal development and improvement can be affected by what you observe, and more often than not he will agree with you because, you see, he knew more about his performance when he came to the meeting than you did. So if you are correct, he already knows it.

Trying Out a Performance Review

Well, for those who are still uptight about performance reviews and just don't know if they are ever going to do one, or who wonder if they did one whether it would be effective, let me suggest a simple test. Now, we have said that everybody really wants to know how they are doing. This little mini-review that I'm going to give you can't fail if you do it right. You can try it out tomorrow morning and see for yourself whether it's good or bad. But be sure you want to know how you're doing before you use it. There are only four points, and I'm not going to list them in order because order is not important.

1. First, ask yourself how you are doing. Be sure you give an honest answer, take time to think about it; then decide how you are doing.

2. Ask your boss how you are doing. Make sure he takes time to give you a good answer. Don't just look for a pat on the back and don't ask him when you see him at the drinking fountain. Ask him when he has the time to tell you how you're doing, and be sure he gives you a thorough answer.

3. Ask your peers how you are doing. Be sure you listen to what they say. Take away their emotion and get down to the real facts.

4. Ask your subordinates how you are doing. Or just listen to them--they'll tell you in many different ways. Be sure that you are listening for the things they are really trying to tell you.

Once you've tested these four areas, if you find that any two are negative, consider yourself to have a pretty significant problem. If three of them are bad, everyone but you knows that you have failed. If only one is bad, think nothing of it. Work on that area and it will clear up.

Now that's a rule of thumb. I don't think you can read about this mini-review anywhere in the textbooks, but it's something that you can do any time you want to. Now, be careful. When you ask your peers how you are doing, if you happen to be in power and you're asking someone in fuel, you won't have to wait long for an answer--they will have one all ready for you. If you're in maintenance in power and you ask someone in operation in power how you're doing, be sure they remove all the emotion before they answer you. Many of you have told me that you think our engineering department sends up bad designs and therefore we have a poor engineering department. But once I ask you to reconsider and tell me what your standard of performance is, and ask if you would accept three percent deficiency, you tell me, no, you'd accept five or six or eight or ten percent. So what you're saying with your heart is not really what you mean when you say somebody is not performing satisfactorily. Be sure you listen, and be sure you make each person answer the question you ask in your mini-review.

Conclusion

Well, there are no one hundred percent solid answers to performance reviews. In these few minutes I've tried to give you some of my philosophy, ideas, techniques, and practices. I will say this: I've been involved in performance reviews for a little over twenty years now, and I've done some bad ones. I also think I've done some good ones. I think that the vendors who supply services for us feel we give them a fair rating, and I believe we receive better service because we do performance reviews. I have personally shared with many top officers of major manufacturing companies what you ask me to tell them about their performance, and I think you will agree that in many cases they have attempted to correct specific problems. Some people, some companies, just cannot change, even if they have a mind to, because of the way they are organized.

Have faith that on the whole the performance review is a positive thing, it's a necessary thing, and it's an obligation that every supervisor has to those around him and he must be fair in his analysis. One of the most important points to keep in mind in performance reviews is that the efforts of the person being reviewed make a difference, and when they fit into the total company business review he knows they make a difference. Whether the review is good or bad, the individual knows how to make it better the next time around.

I hope you have a good performance review the next time around--the next time you give one or the next time you receive one.

the assessment center method: an effective strategy for human resource development

Patrick J. Gilbert and Cabot L. Jaffee

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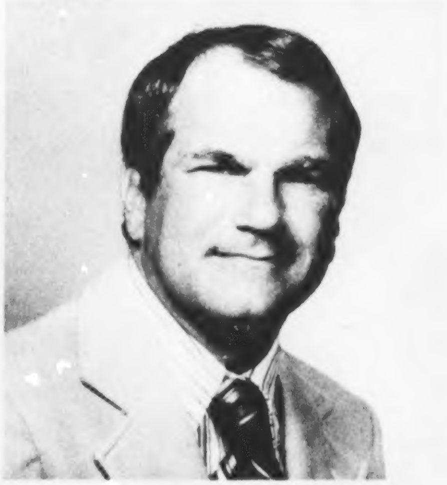

Cabot L. Jaffee, Founder and President of Assessment Designs, Inc., began his career with American Telephone and Telegraph in the Bell System Assessment Program. He then went to the University of Tennessee, where he became Professor of Psychology and Industrial Management, and established himself as the world's first and leading consultant in the area of assessment centers. He also developed the first program of its kind within the entire Federal Government for the Internal Revenue Service. Since that time, Dr. Jaffee has consulted with hundreds of major corporations and government agencies on their assessment programs.

THE ASSESSMENT CENTER METHOD:
AN EFFECTIVE STRATEGY FOR
HUMAN RESOURCE DEVELOPMENT

The assessment center method is a process of evaluating managers in exercises or situations which accurately simulate a particular job. Assessment centers are highly valid in predicting successful performance on the job, and use of the method continues to increase. While assessment centers have traditionally been used for selection, a growing number of organizations are finding them valuable for human resource development.

Through observation of the individual in job-like situations, the assessment center generates accurate information on an employee's strengths and weaknesses in skills that are important to successful job performance. This information can then be translated into the design of programs geared toward organizational development or development of the individual employee. Educational institutions are also finding assessment centers to be particularly helpful for career planning.

This chapter addresses a number of the developmental benefits and applications of assessment centers. A chronological account of the process involved in developing an assessment center is provided and the standards and concerns for operating a center are discussed. This chapter also describes the settings in which assessment centers are currently being utilized and offers projections regarding future applications of the method.

I. Introduction

Throughout the 60's and 70's people became increasingly aware of their unique abilities, values, and needs. They exhibited a heightened motivation to achieve their full potential in whatever endeavors occupied a place of importance in their lives. Quite naturally, this same sense of self-awareness and need for achievement was evident also in the work environment and has had significant implications for human resource management. Employees showed a desire for growth and achievement in their jobs and sought to develop their skills and abilities in order to realize this goal.

As we enter the 80's, however, many organizations are finding that the economic growth of the past 20 years has slowed. During this time of relative austerity, management is facing the problem of how to meet employee needs and improve productivity given the constraints of slowed economic growth and restricted resources. Many organizations see a need for improved human resource development as a viable strategy for meeting this challenge.

While employees seek higher levels of personal achievement and self-actualization, management strives to maximize its efficient use of human resources in order to meet organizational objectives. These two goals, while often perceived as incompatible, are, in fact, congruent in that the achievement of one can facilitate progress toward the other. Through this common desire and a coalition of effort, the 80's will see a dramatic increase in the number of developmental projects and use of innovative human resource methodologies. In particular, increased emphasis will be placed on ways of utilizing the assessment center method so that it may reach its full potential as an effective, positive developmental strategy.

This paper discusses the developmental benefits that may be gained through use of the assessment center and how the center may become an integral component of a developmental program. The process of designing and developing an assessment center is discussed, and its use for employee and organizational development is explored.

II. The Assessment Center Defined

Assessment centers have been used by private sector organizations for almost 30 years (Jaffee & Cohen, 1980) and have impacted on the careers of literally hundreds of thousands of managerial personnel (Byham, 1977; Huck, 1977; Zenke, 1980). Reaction to the assessment center method has been extremely favorable and growth of assessment center use over the past decade can only be described as phenomenal: from 12 organizations operating centers in 1969 (Byham, 1977) to current estimates of approximately 2,000 (Nichols & Hudson, 1981; Parker, 1980). This widespread growth has led to the assessment center being employed in a variety of settings with application to an increasingly diverse range of personnel.

While most personnel practitioners are now familiar with the term "assessment center," a great many are not familiar with the characteristics that define the use and operation of the assessment center method. As noted by Bray (1976), "The term 'assessment center' is somewhat of a misnomer since it implies that there must be a building or some other physical location for the activity" (p. 16-1). The term "assessment center" denotes a process of appraising a person's skills and abilities--not a location for doing so. Numerous definitions of the term have appeared in the literature, for example:

> The term 'assessment center' refers to a standardized program which employs a variety of objective, projective, and situational techniques, as well as interviews and a committee of assessors to arrive at certain kinds of conclusions about assessees. (Grant & Slivinski, 1970, p. 3)
>
> An assessment center can be described as a multimethod, multitrait, and even multimedia technique. Essentially, it is a series of individual and group exercises in which a number of candidates participate while being observed by several specially trained judges. The exercises are simulations of managerial tasks designed to test various managerial skills. (Kraut, 1976, p. 31)
>
> It is a process in which individuals have an opportunity to participate in a series of situations which resemble what they might be called upon to do in the real world. They are tested by situational or simulation exercises and multiple-trained assessors process in a fair and impartial manner. (Jaffee & Sefcik, 1980, p. 40)

While these definitions bear a large degree of similarity and are essentially accurate, a canonical description of the term has been compiled by the Task Force on Assessment Center Standards. This definition has been endorsed by numerous practitioners (Adler, 1978; Boehm, in press; Jaffee & Cohen, 1980; Norton, 1977; Zenke, 1980) and provides criteria for distinguishing an assessment center from other modes of employee selection and development.

> An Assessment Center consists of a standardized evaluation of behavior based on multiple inputs. Multiple trained observers and techniques are used. Judgments about behavior are made, in part, from specially developed assessment simulations.
>
> These judgments are pooled by the assessors at an evaluation meeting during which assessors agree on the evaluation of dimensions and any overall evaluation that is made. (Task Force on Assessment Center Standards, 1979, pp. 19-20)

In summary, the "assessment center" method is a multiple appraisal technique which involves the use of several trained "assessors" who observe and evaluate the performance of several "participants" across several skill categories in several situational tests or exercises. These exercises simulate the critical components of a target position and are designed to elicit the managerial skills that have been averred as critical to successful performance in the target position.

III. A Developmental Assessment Center

The assessment center is an extremely flexible method and may assume a wide variety of forms when implemented in an organization. Because of this, any description of the "typical" assessment center runs the risk of misleading the reader into believing that such a thing does indeed exist. The specific components and constraints of an assessment center are determined by an organization's particular needs and resources. These needs and resources vary considerably among companies of a related industry (e.g., insurance, manufacturing, transportation) and even more so among companies of different industry groups. Given these differences, the typical assessment center is, paradoxically, atypical. The basic role of the assessment center is to generate good information about an individual's strengths and weaknesses. The use to which the information is put may vary.

For the purpose of this article, however, it will behoove the reader to envision some type of developmental assessment center, and for this reason an illustrative model has been provided (see Figure 1). This

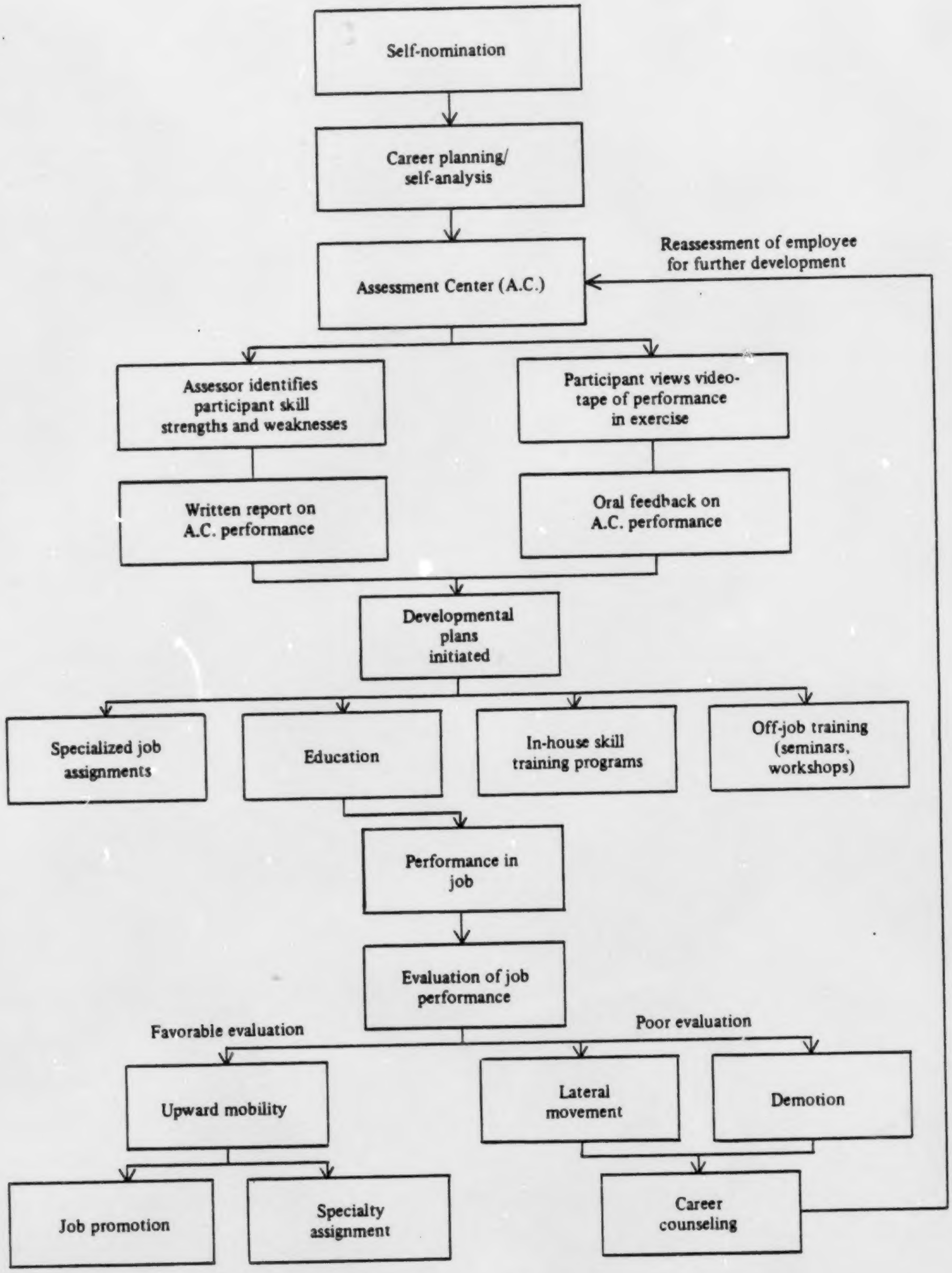
Self-nomination
Career planning/ self-analysis
Assessment Center (A.C.)
Reassessment of employee for further development
Assessor identifies participant skill strengths and weaknesses
Participant views video-tape of performance in exercise
Written report on A.C. performance
Oral feedback on A.C. performance
Developmental plans initiated
Specialized job assignments
Education
In-house skill training programs
Off-job training (seminars, workshops)
Performance in job
Evaluation of job performance
Favorable evaluation
Poor evaluation
Upward mobility
Lateral movement
Demotion
Job promotion
Specialty assignment
Career counseling

Figure I. Application of the Assessment Center In a Human Resource Development System

example is a composite of many companies' centers and integrates the more common features of each. The following points delineate the authors' version of a "typical" assessment center:

- Employees who meet organizational standards (e.g., educational level) are given the opportunity to nominate themselves for participation in the center (Bohem, in press; Jaffee & Cohen, 1980).
- A group of twelve participants is then scheduled to attend the center (Bray, 1976; Byham, 1970; Campbell & Bray, 1967; Mcloskey, Slivinski, & Bourgeois, 1980; Quick, Fisher, Schkade, & Ayers, 1980; Wilson & Tatge, 1973).
- The participants are divided into two groups of six for the purpose of administering two group discussion exercises which require six participants each (Bray, 1976; Mcloskey et al., 1980; Quick et al., 1980).
- Assessors are selected from in-house personnel and are two organizational levels above the participants being assessed (Bender, 1973; Gilbert, 1981; Howard, 1974; Quaintance, 1980).
- The assessor/participant ratio is one to two, or a total of six assessors for twelve participants (Bray, 1976; Byham, 1971; Mcloskey et al., 1980).
- Participants are observed performing in simulation exercises for two to two and one half days (Bucalo, 1974; Cascio & Silbey, 1979; Moses, 1973; Wilson & Tatge, 1973).
- Assessors write exercise reports and spend one day conducting the team meeting process. Here each participant's performance for each exercise is individually discussed and assessors arrive at a consensus rating for each skill category measured (Cascio & Silbey, 1979; Quick et al., 1980). The team meeting process requires from one to two hours per participant (Bray, 1976; Cascio & Silbey, 1979; Gilbert, Cohen, & Smith, 1981; Quick et al., 1980).
- Each assessor is designated one or more participants for whom he/she is required to write a final report: a written narrative summary of a participant's strengths, weaknesses, and overall performance in the center (Bender, 1973; Byham, 1970; Howard, 1974).
- Each participant receives immediate oral feedback regarding his/her performance (Bender, 1973; Howard, 1974). This feedback focuses on the participant's performance in each skill

category and may occur before or after the final report is written.

- A written final report is prepared regarding each participant's overall performance in each skill category measured (Bender, 1973; Boehm, in press; Nichols & Hudson, 1981).

- The assessment center data are used to determine the participant's strengths and weaknesses in the skill categories identified as critical to job performance (Boehm & Hoyle, 1977; Hart & Thompson, 1979).

- Training programs are designed and geared toward developing the participant's skill deficiencies (Nichols & Hudson, 1981; Olivas, 1980; Wentworth & Thacker, 1980).

The assessment center should not be used as a developmental tool by itself, but should be integrated as one component of an organization's total human resource development system. The center fits in well with a "systems" approach and can be used in conjunction with employee biodata, performance appraisals, and psychological tests, as well as other personnel management methodologies such as Management by Objectives (Wentworth & Thacker, 1980). The assessment center's possible role in a developmental system is illustrated in Figure 1.

IV. Establishing an Assessment Center

The development of an assessment center is a complex and time-consuming task that should always begin with a clear determination as to what the center will be used for. In stating the purpose of the center, an organization must admit that a need and/or problem exists for which the assessment center is a viable solution. For example, a company which has experienced difficulty in securing competent personnel for high-level management positions may utilize an assessment center for the purpose of identifying weaknesses and developing competency in various skills for lower-level managers slated for upward mobility. Recognition of the need for an assessment center is not a description of the organization's problem; rather, it is a proposed solution to an area of concern. As stated by Boehm (in press), if the problem is not defined, the odds are very small that an assessment center will appropriately address it.

Once the particular problem or organizational need has been identified, the overall objective of the assessment center must be defined. Defining specific, measurable objectives will aid in establishing criteria against which success of the program can be evaluated later. The objectives are important in determining the center's administrative procedures, operating budget, and overall impact on the organization. For example, determining whether a center will be used for selection or development will have a decided impact on the design of exercise materials and the use and dissemination of future assessment center data.

Before proceeding with development of the center, the consultant or in-house personnel practitioner must secure the organization's commitment to the program and confidence in the validity of the method as a workable strategy for achieving its prestated objectives. It is essential to attain the sincere commitment of all line and staff personnel involved in the design of simulation exercises or staffing of the assessment center (e.g., administrators, assessors, role players). Managers are unlikely to devote a lot of time and energy to a program they don't believe in, especially if it has been forced upon them by an outside source. As stated by Boehm (in press), "Even if the technical aspects of assessment center design and administration are carried out optimally, lack of before-the-fact organizational commitment will operate to undermine the success of the undertaking."

Once the problem or area of need has been identified, the specific objectives of the program defined, and the commitment of the organization secured, development of the assessment center materials can begin. The first and most important step in developing an assessment center is to conduct a thorough job analysis of the position or job level for which the assessment center is to be employed. The job analysis provides the framework from which the assessment center is developed. The job analysis identifies tasks and situations that are characteristic of a target job and the particular skills and abilities that are required to perform effectively in that position. There are numerous methods for obtaining job analysis data. Some of the more commonly employed are interviews with job incumbents and/or their supervisors, job/task analysis questionnaires, on-the-job observation of incumbents, and analysis of critical incidents. Each of these methods provides information that is useful in identifying the unique characteristics and properties of a job and, when incorporated in the design of the simulation exercises, establishes the relevancy and job-relatedness of the assessment center. Establishment of job-relatedness will help ensure the validity of the simulation exercises, as well as increase acceptance of the center by the persons being assessed: a quality commonly referred to as "face validity" (Kraut, 1972). Although not a numerical index subject to statistical analysis, the presence of face validity enhances acceptance of the measurement device and its results by those persons whose performance is being measured (Gilbert, 1981).

Once the required job analysis data have been obtained, the skills to be assessed must be identified. Program developers examine behaviors and task statements that were assimilated in the job analysis and determine which skills (e.g., leadership, interpersonal, organizing and planning) are required to successfully perform each of these tasks and behaviors. The behaviors are then grouped according to skill categories and re-examined. This process provides insight regarding the relative importance of various skills to the target job and generates information which is of use in developing behaviorally-anchored definitions for each critical skill. Each skill is a distinct category under which observed behaviors can be reliably classified. All skill categories shown to be critical to successful job performance are considered in the development of the center's exercises.

The job analysis information also reveals the particular activities and situations that are related to the target position. This information is used to determine the general type of exercises required and the specific components, issues, and constraints that should be incorporated into the design of each. The total package of exercises is designed to represent the types, complexities, and difficulty levels of the activities required on the job. Additionally, the exercises are designed to elicit the skill categories identified as being of critical importance to job performance. This procedure is a crucial step in the development of an assessment center; for, as noted by Byham (1980), "an assessment center that measures the appropriate dimensions in the wrong situations produces inaccurate predictions" (p. 30). For example, measuring a participant's interpersonal skills while interacting with an irate customer is inappropriate if target job incumbents do not have exposure to an organization's clientele. Conversely, if target job incumbents are responsible for providing performance feedback to subordinates, it may be desirable to measure their interpersonal skills in some type of employee counseling situation.

In summary, the job analysis data dictate which skills are important to measure and the types of simulation exercises that are required to measure these skills. The culmination of this effort is often illustrated in a skill matrix (see Figure 2). The skill matrix is a grid which lists the exercises along the top row and skill categories in the far left column. Weightings are plotted in each cell and represent the degree to which each exercise elicits each skill. The matrix is a reflection of the job and represents the center's total exercise package.

Once completed, the exercises are reviewed by an organization's personnel familiar with the target position. If need be, the exercises are then revised and further reviewed until they provide an accurate simulation of the job in question.

All administrative and clerical procedures associated with operation of the center are established concurrently. This may include such things as development of report forms, schedules, assessor training materials, and procedural guidelines for the dissemination of participant skill evaluations. Careful attention to these administrative details can prevent mistakes from occurring and enhance the overall efficiency of the center's operation.

Exercise Skill	In-Basket	Group Discussion	Employee Counseling	Problem Analysis
Leadership	X	XXX	XX	N/A
Inter-personal	X	XX	XXX	X
Decision-making	XX	X	XXX	XX
Decisiveness	XX	XX	X	XXX
Perception	XXX	X	XX	XXX
Organizing & planning	XXX	X	XX	XX
Adaptability	N/A	XXX	X	XX
Oral communication	X	XXX	XX	XXX
Written communication	XXX	N/A	X	XX

Figure 2. Assessment Center Skill Matrix
XXX - Very heavily measured
XX - Heavily measured
X - Measured

The next phase in establishing a center involves the selection and training of assessors. As previously mentioned, assessors are usually two organizational levels above those persons being assessed. Assessors may be trained by experienced in-house personnel or by external consultants, depending upon the preferences and/or resources of the host organization.

The organization must then select employees (participants) to attend the center. For selection purposes, participants are commonly nominated by their superiors (Howard, 1974); whereas for development or diagnostic purposes, participants are often self-nominated (Baker, 1980; Jaffee & Siegel, 1980). The organization must consider the time and resources required of the center when it decides who and how many people will be assessed.

At this point, the assessment center is ready and can be scheduled for operation. To summarize, the following is a chronological account of the steps taken in establishing an assessment center.

1. Identify organizational problem or area of need.
2. Define objective of assessment center.
3. Secure organizational commitment.
4. Conduct job analysis and review data.
5. Identify skills critical to successful job performance.
6. Identify situations and tasks that are characteristic of the job.
7. Develop the simulation exercises.
8. Develop administrative materials and establish operating procedures.
9. Select and train assessors.
10. Determine employees to be assessed.
11. Conduct the assessment center; write exercise reports and have the team meet to derive final ratings and write final reports for each participant.
12. Initiate developmental activities based upon data generated at the center.

13. Reassess participant to determine progress and/or further development needs.

V. Utilization of the Assessment Center Method

Since its first operational use in the Bell System in 1956 (Jaffee, 1965), the assessment center method has been employed in a wide variety of settings including educational institutions (Boehm & Hoyle, 1977; Norton, Poertner, & Creasy, 1977); retail distribution (Byham, 1970); federal and state agencies (Cohen, 1980; Cohen & Sands, 1978); the military (Norton, 1980); foreign and domestic manufacturing (Hinrichs & Haapera, 1976); the oil industry (Howard, 1974; Mitchel, 1975); public utilities (Archambeau, 1979; Schmitt, 1977); hospitals (Cohen, 1980); and other service-related industries (Gilbert, 1981; Parker, 1980). Use of the method has enjoyed accelerated growth and its application has become increasingly diversified. This has been due in large part to strong supportive research which has continued to yield very favorable results. Assessment center ratings have been shown to be highly reliable (Bray & Grant, 1966; Huck, 1973; McConnell & Parker, 1972) and valid in predicting future job success (Huck, 1973; Norton & Edinger, 1978). Yet because of this ability to predict "success," the assessment center has been traditionally used for selection (Olivas, 1980), while developmental benefits have often been overlooked or merely given lip service (Moses, 1980).

In the 1980's, assessment center use will shift noticeably from strictly selection to more developmental applications. As Boehm & Hoyle (1977) state, there are basically three categories of contemporary assessment center application: selection, identification, and diagnosis. In the selection center, assessment data are used to aid management in choosing the best person for a particular job or job level. In the identification center, management seeks to identify employees with long-range potential for organizational advancement. In the diagnostic center, management determines training and development needs by deriving an accurate profile on employees' strengths and weaknesses. The latter two categories are clearly developmental applications and are descriptive of the shift in assessment center use.

Alexander (1979) surveyed 65 organizations utilizing the assessment center method. He found that the participant's immediate supervisor coached the employee on improving assessed weaknesses in 49 percent of the organizations surveyed; discussed the participant's training and development needs in 45 percent; discussed the career plans of the participant in the feedback process in 45 percent; and initiated with the employee a developmental plan as a result of participation in the center by 36 percent. Cohen (1980) obtained similar results in a survey of 64 organizations. Cohen found that 46 percent of these organizations used their center for training and career planning, while 48 percent used the center for selection purposes. Although in both surveys less than 50 percent of the respondents utilized the center for developmental purposes, the authors believe that within the current decade employee development will become the predominate use of assessment centers, surpassing the method's historical role as a selection device.

Participants are supportive of this trend and have strongly endorsed use of the assessment center in a developmental context. Kraut (1972) found that 64 to 94 percent of participants questioned responded favorably when asked about the effectiveness of assessment centers in promoting self-development. The Canadian Public Service Commission reported that 88 percent of their center's participants found information generated at the center to be helpful in their personal self-development (Dodd, 1977).

Inclusion of the assessment center in a development system is pragmatic and easily understood. All developmental programs rely heavily upon the generation of accurate information regarding the performance and potential of participating employees. Without accurate information, management leaves to chance the probability that a program will meet the organization's or the employee's specific developmental needs. As the assessment center has been identified as being superior to any other technique in identifying managerial strengths and weaknesses, it provides a major contribution to any developmental framework through the generation of accurate information.

VI. Developmental Benefits and Applications

The developmental benefits of an assessment center are inherent in the methodology's primary goal: to provide an evaluation of behaviorally-defined skills based on observed performance in "job-like" situations. Regardless of its intended purpose or objectives, participation in a properly designed assessment center is a developmental experience. A participant is afforded the opportunity to function as a manager while his/her performance is scrutinized by an objective observer. Developmental benefits are enhanced to the extent that performance feedback is provided; yet even without formal feedback, according to Byham (1971), participants gain "fairly accurate" self-insight regarding their particular skill strengths and weaknesses. It has been reported that participants share a similar viewpoint and believe that attendance at an assessment center has an immediate positive effect on their work situation (Slivinski, McDonald, & Bourgeois, 1979). These developmental advantages can be even greater for a center specifically designed to provide feedback in a nonthreatening supportive atmosphere vs. one oriented toward selection or promotion decisions.

Development of the Individual

A developmental assessment center provides a nonthreatening learning environment for the individual. As Hart and Thompson (1979) aptly put it, "Participants in a developmental center are all winners: they all gain greater insight into themselves" (p. 76). The center provides an employee with accurate information regarding his/her skill strengths and weaknesses in several job-like situations.

These skills are defined using behavioral terms that describe actual job duties, tasks, and responsibilities characteristic of a higher-level position. Exposure to the assessment center and performance feedback enable participants to develop a better understanding of and realistic job expectations for an upward mobility position to which they may aspire.

Following assessment, the organization may then implement a developmental program designed to improve the employee's skill competency in deficient areas. The program may consist of any combination of formal classroom training; external or in-house workshops and seminars; individual self-development activities such as special readings or workbook assignments; job rotation, job enrichment; or special job assignments. The developmental plan is tailored to meet the employee's individual needs and improve his/her competency in skills required for effective performance. Because the development is geared directly to the individual's specific needs, an employee won't find training activities overly simple or complex, as can happen when general prepackaged developmental programs are routinely administered to a large group of employees slated for general "development and promotion."

Individually tailored programs, while potentially more costly and time-consuming, can result in more efficient employee development and more effective expenditure of company resources. The individual benefits through his/her own personal development; the organization benefits by avoiding redundant or otherwise inappropriate training endeavors.

Career Planning

As previously stated, the assessment center provides a highly accurate estimate of managerial potential and generates valuable data for use in career counseling. The organization can control the direction and rate of job progression for an employee and optimally match this to the individual's assessed abilities. High potential employees can be engaged in challenging "fast-track" developmental activities, while low potential employees can move laterally into positions that would benefit from their strong abilities and/or provide enriched job opportunities for them to develop their deficient skill areas. In addition to skill development, employees form realistic job expectations of upper level management positions. This information, in conjunction with feedback on skill abilities, allows participants to make informed decisions about their career plans and work goals. Employees may decide that their abilities aren't suited for a career in a particular field or that a specific position is not in accordance with their personal goals and ambitions. In any case, employees are afforded the opportunity to select a career path that will be personally rewarding and that will capitalize on their unique skills and abilities.

Assessor Training

A major developmental benefit of the assessment center method is realized through the assessor training process. Practitioners have long acknowledged the benefits of assessor training (Alon, 1977; Boehm & Hoyle, 1977; Byham, 1971). Kraut (1972) stated that "In the future we may expect to see managers being sent to assessment centers in lieu of other management courses, specifically to become more astute in behavioral observation, group dynamics, and problem solving" (p. 325). So strong are these benefits that General Electric has established a policy of a one-to-one assessor-participant ratio in order to expose a greater number of managers to this experience (Byham, 1970).

During assessor training, managers are taught to observe and document behaviors, and then categorize these behaviors into appropriate skill dimensions. They learn to evaluate a participant's performance and make behavior-based rather than purely subjective judgments about the adequacy of this performance. Managers are also trained in interviewing techniques and in providing performance feedback to participants. These vital aspects of the assessment center method--observation, analysis, and evaluation--are integrated into the daily work activities of the manager, who becomes better able to provide feedback and compile accurate performance appraisals. Repeated experience with participants in various situational exercises will lead to stronger management skills and greater accuracy in selection decisions.

Employee Morale

A more peripheral developmental advantage of the assessment center is its effect on employee morale. Although no empirical research has been performed to evaluate specifically this effect, it has been reported that participation in a developmental assessment center increases employee morale (Nichols & Hudson, 1981). Because the assessment center can be a costly and time-consuming process, implementation of a center demonstrates an organization's commitment to the individual. It shows that the organization is willing to expend a great deal of time and resources in support of the individual's desire for self-improvement.

Facilitating Attitude Change

The assessment center may also function as a stimulus in altering the attitudes of an organization's personnel and their approach toward human resource development. The method exposes management to a relatively new and unconventional personnel strategy of readily apparent effectiveness and empirical merit. Participants are greatly sensitized to their own shortcomings and become more open to developmental ideas and training. As such, the assessment center method assists in "unfreezing" traditional and often stubborn attitudes that may be resistant to organizational change.

Organizational Development

Assessment centers have been successfully integrated with organizational development (OD), a methodology which Alon (1977) described as "a process of planned change geared to increasing an organization's effectiveness" (p. 226). As part of an OD program, the assessment center can be effectively used to evaluate organizational strengths and weaknesses at a specific position, division, or departmental level. Assessment data are summarized for a large number of employees to identify common areas of need. These areas of need are evaluated and prioritized to determine which require immediate attention. This information is then considered when allocating training and development expenditures. More efficient use of resources is achieved by designing organizational training programs to address the specific needs of a job level, position, or division.

Developing Pools of Talent

In a similar vein, the center can be used to identify and develop a pool of replacements for higher-level management positions. Employees with the potential, requisite skill abilities for higher-level positions are identified from various areas within the organization. These individuals are then engaged in a variety of training activities designed to expedite their development as managers for specific positions, job levels, or areas of need. Openings in management can be rapidly filled by promoting personnel from within, negating or at least attenuating the need for external recruitment. The organization can satisfy a wide variety of its personnel needs by drawing from this pool of managerial talent, thereby maintaining a high degree of readiness and flexibility amid changing circumstances.

Equal Employment Opportunity and Affirmative Action

As an objective procedure which measures all participants on relevant job skills, the assessment center has been used as an alternative to questionable or sometimes discriminatory paper and pencil tests. Assessment centers have been shown to be highly valid in predicting future job success (Bray & Grant, 1966; Kraut & Scott, 1972) and equally valid for blacks and whites (Huck & Bray, 1976; Jaffee, Cohen & Cherry, 1972), as well as males and females (Moses & Boehm, 1975). The high content validity inherent in the design and development of an assessment center has contributed to its use in organizations sensitive to equal employment concerns (Byham, 1977; Cohen, 1977). Use of assessment centers has been challenged and upheld in the courts (Filer, 1979; Mendenhall, 1977; Thornton, 1971) and use of the assessment center was specifically sanctioned in a consent decree between AT&T and the EEOC (Bray, 1976).

These factors attest to the assessment center's merit as an effective evaluative tool for identifying high potential women and minority group members for upward mobility. The center can facilitate achievement of affirmative action goals by identifying high potential minority and female employees for participation in "fast-track" or upward mobility programs.

In addition, the center can identify and aid in developing the skill deficiencies of minority and female employees, thereby enabling them to participate in the ranks of management--an area that has been traditionally criticized for under-utilization of protected groups.

Evaluating the Effectiveness of Training and Development Programs

An interesting and innovating application of the assessment center involves its use as a measure of the effectiveness of training and development programs (Olivas, 1980). Wentworth and Thacker (1980) state that this can be accomplished through a pre/post design where an employee is assessed prior to participation in a developmental program and then reassessed immediately after completing the program requirements. Employees are evaluated to determine the degree to which they have improved their skill weaknesses. As the authors correctly noted, this research does have its design flaws: The development program has not been isolated as the causal factor leading to differences in assessment center performance. In other words, there are other factors, such as interim job experience, that could account for skill development.

To address this issue, the authors of this paper propose an alternate research design using two groups of randomly assigned subjects. One group would receive pre- and post-development assessment before and after development training; the other group would receive a single assessment without development training (see Figure 3).

A lack of skill improvement for employees in the training program would indicate either that the development program was not effective or that the skills in question are not easily developed. Through such an evaluation the organization can determine if the program is accom-

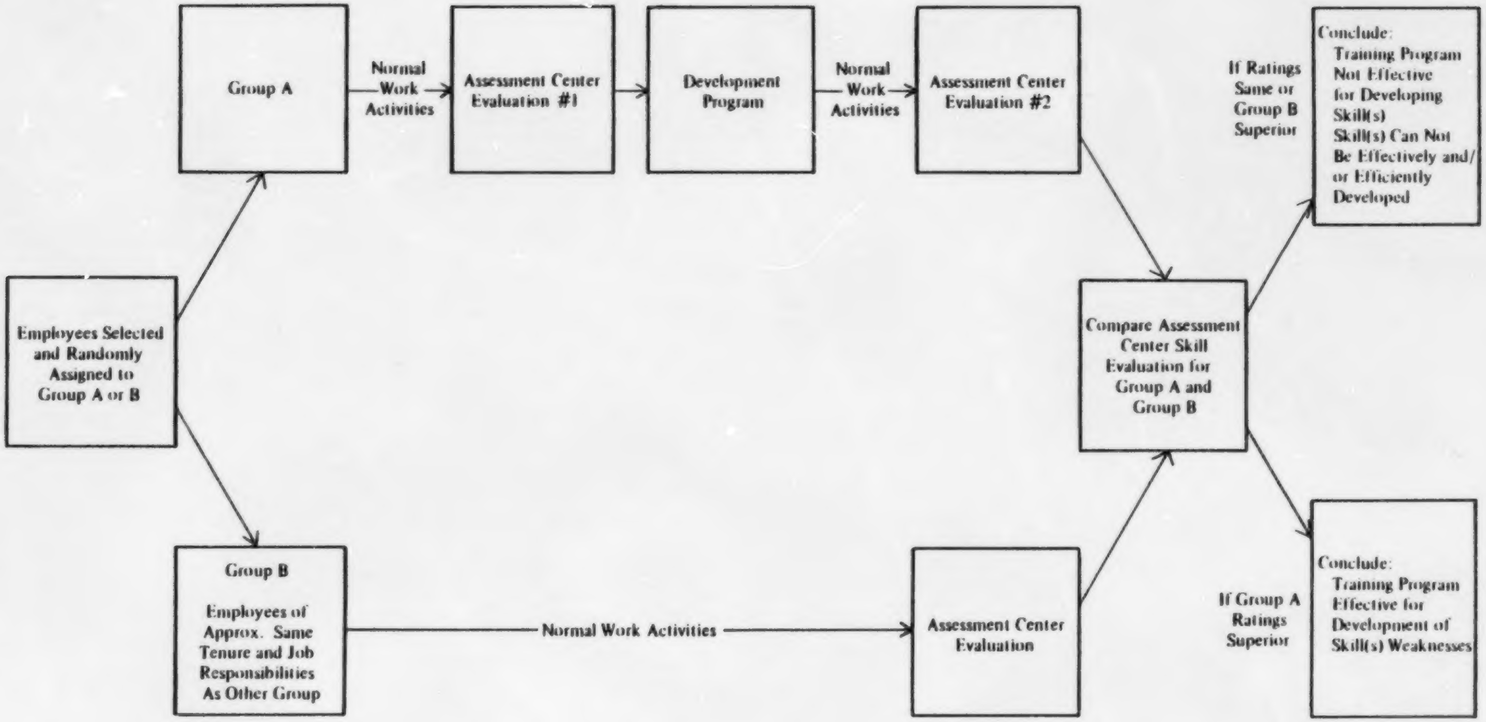
Group A
Normal Work Activities
Assessment Center Evaluation #1
Development Program
Normal Work Activities
Assessment Center Evaluation #2
If Ratings Same or Group B Superior
Conclude: Training Program Not Effective for Developing Skill(s) Skill(s) Can Not Be Effectively and/or Efficiently Developed
Employees Selected and Randomly Assigned to Group A or B
Compare Assessment Center Skill Evaluation for Group A and Group B
Group B
Employees of Approx. Same Tenure and Job Responsibilities As Other Group
Normal Work Activities
Assessment Center Evaluation
If Group A Ratings Superior
Conclude: Training Program Effective for Development of Skill(s) Weaknesses

Figure 3. Evaluation of Program Effectiveness Using The Assessment Center

plishing its goal (e.g., improvement of competency in skills) and which aspects of the program may require revision or deletion due to ineffectiveness.

Educational Settings

More recently the assessment center has been employed in a variety of educational settings, geared mainly toward self-development and career counseling. This is a new and emerging application of the assessment center method, one which will enjoy more widespread acceptance as results attesting to the method's effectiveness in education become better known.

Baylor University. Baylor University makes use of an assessment center to evaluate students admitted to the Personnel Development Seminar conducted each year at its Hankanar School of Business (Clearinghouse for Applied Performance Testing. See Career Planning and Assessment at Baylor University, 1979). The seminar begins with a three-day experience at the center where students are assessed in 20 managerial skill categories. Students receive specific behavioral feedback on their performance and develop an awareness of their particular skill strengths and weaknesses. The process is designed to enhance self-awareness and expose students to effective and ineffective managerial behaviors.

The seminar has been favorably received by participating students and the business community, which endowed a professorship to ensure continuation of the program.

Alverno College. Since 1973, Alverno College has been using the assessment center as the basis for a competency-based learning program (Boehm & Hoyle, 1977). Students advance toward their degree on the basis of assessed competence rather than accumulated course credits. Assessors are selected from faculty, advanced students, alumni/ae, and professionals. Assessment results are used to evaluate the proficiency of each student and to provide developmental advice and career counseling.

University of Missouri. A developmental assessment center has been successfully used for MBA students at the University of Missouri-St. Louis (Norton, Poertner, & Creasy, 1977). Students were assessed as participants and then trained to be assessors. Students found the center to be a worthwhile tool for learning how management potential is measured, for judging the management potential of candidates, and for developing skills associated with assessor training (e.g., behavioral observation and documentation). Students also reported that the center was beneficial in identifying their particular skill strengths and weaknesses. Student response to the program was favorable and indicated that the center should be included in the class curriculum and possibly be made available to all incoming MBA students, using trained MBA students as assessors.

Nova University. Nova University in Fort Lauderdale, Florida, has used the assessment center as a mid-career counseling tool for its Ph.D. program in educational administration (Byham, 1977). A trained individual representing the school travels to various cities throughout the United States administering the assessment technology. Videotapes are filmed of each participant's performance in the center. Assessors at a single location analyze the participant's written responses and videotaped performance and formulate overall skill evaluations. This unique administration of an assessment center makes the method available to individuals who might not have been able to participate otherwise.

Public Schools. A more recent application of the assessment center occurred in Michigan's Wayne County Intermediate School District. A performance-based assessment center was designed to measure objectively the developmental needs of high school principals employed throughout the school district. The center had a strictly developmental function and no selection decisions were based on assessment data. In contrast, the Pinellas County School District of Florida implemented an assessment center for the purpose of selecting assistant school superintendents. Here the center's primary goal was selection; however, information derived from the assessment process provided valuable insight regarding the participants' developmental needs.

Educon. Educon, a consulting firm in assessment center technology, provides an assessment center program for use in career counseling at high school and community college levels. Educon's Life Skills Assessment Profile (LSAP) identifies a student's skill strengths and weaknesses and then matches these abilities to compatible occupational groups. The program was designed to provide school counselors and students with a more accurate prediction of the career areas in which a particular student could expect the greatest chance of success.

The LSAP is an innovative career guidance tool that is particularly useful to counselors in assisting clients to explore the appropriateness of different career options. A study conducted on its use with community college students revealed that it was highly evaluated by clients and was significant in enhancing their knowledge about suitable occupational alternatives.

Other Educational Programs. Assessment centers have also been incorporated into graduate programs for business at Brigham Young and Stanford Universities (Byham, 1977) and at Pace and Eastern Michigan (Boehm & Hoyle, 1977). Their primary emphasis is diagnosis, self-development, and career counseling for business students aspiring to become managers.

The assessment center is a viable educational tool for applying a managerial perspective to an academic setting. Reaction to the center has been very favorable and should encourage increased use in a greater variety of educational settings.

VII. Summary and Conclusions

The assessment center has survived the tests of time and scientific scrutiny to become an established methodology for the selection and development of human resources. Research has attested to the validity of the method for accurately predicting managerial success, and its use as a selection device has increased exponentially over the past decade.

As acceptance of the method has become more widespread, its use has become more diversified. Centers are no longer used solely for selection and have been applied to the areas of career counseling and self-development. It is recognized that participation in an assessment center is a developmental experience in and of itself, regardless of how the resulting data are applied. Developmental benefits, however, are enhanced when a center is designed specifically for employee development and evaluations are made in a supportive nonthreatening environment. Increasing numbers of centers are being designed exclusively for employee development, and this trend should continue well into the 1980's, when developmental applications are expected to surpass the assessment center's traditional use as a selection device.

The center has been successfully used for individual development and career counseling, and its potential as a catalyst in organizational development is promising. The assessment center can be an effective aid in developing pools of managerial talent and facilitating achievement toward affirmative action goals. Assessor training has long provided a developmental opportunity for managers wherein they learn to make behaviorally-based judgments about a person's skill abilities in job-like simulations.

It has been reported that use of the assessment center has a positive effect on employee morale, particularly when assessment is used for developmental purposes. The assessment center's effectiveness is readily apparent to participants and assessors, and this can serve to "unfreeze" traditional or rigid attitudes regarding the management of human resources.

Centers are appearing more often in educational settings and, as more research is conducted to investigate the center's effectiveness in this area, their use as an educational tool should increase. The center has been used for self-development and career counseling, and its success has prompted the establishment of a consulting firm whose sole function is to provide educational institutions with career guidance programs.

The center can be employed to establish criterion data for evaluating the effectiveness of training and development programs. This is a challenging new application of the assessment center method and should precipitate a host of empirical research endeavors. In the future, assessment evaluations may substitute for job performance data as criteria for evaluating the validity and effectiveness of performance appraisal, selection, and placement tests; weighted application blanks; and employee biodata. The center has the advantage of providing an immediate measure of performance, whereas job performance data can take months to establish and collect. This new direction will have to be approached with great caution in light of the potential legal ramifications associated with matters involving employee selection and placement.

The assessment center is a relatively expensive appraisal technique when compared with traditional selection methods (Glueck, 1974; Hinrichs, 1969); but the potential high return on investment can more than justify the initial expense involved (Cascio & Silbey, 1979; Cohen, 1980). The center's utility as a developmental tool, however, is an area that warrants additional research. Future costs analysis and return on investment surveys could aid in defining the parameters (e.g., minimum number of participants, maximum length of training) within which a developmental center must operate to be financially feasible. Future research should also focus on determining the extent to which particular skills and abilities can be developed. There is a need to identify the skill categories for which development is prohibitively expensive or time-consuming. More weight can then be given to the assessed potential of "non-developable" skills when selecting employees for advanced positions or designing upward mobility programs.

As was earlier stated, the assessment center's major contribution to personnel management is the generation of accurate information regarding an individual's skill potential. This information is of paramount importance in designing training and development programs, as well as in making selection decisions. Because of its versatility and proven effectiveness, assessment center use will continue to increase and innovative applications of the assessment center method will continue to address the needs of the business and educational community.

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